User Guidance Manual

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adept management ltd

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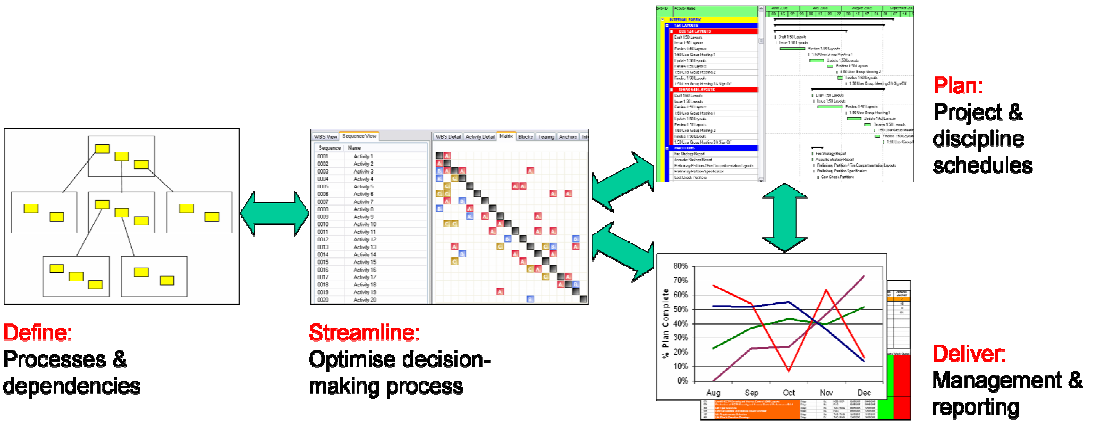
CHAPTER 1: INTRODUCTION

1.1 Welcome to ADePT

Many programme over-runs and cost over-spends in complex projects are the result of design and engineering teams working with poorly co-ordinated design information. The 'ADePT' technique and associated ADePT Design software suite are used to develop integrated design plans which ensure that designers are able to work together to generate a fully co-ordinated design.



ADePT is a highly structured approach to planning, and subsequently managing, the design activities within a complex project. The approach is aimed at development of a design plan which is fully integrated across the design team members and based on the critical flows of information between them. Subsequent management of information flows is regarded as a much better way of controlling the design process than simply monitoring production of deliverables or rate of fee spend. There are three stages to planning with ADePT, and a further management stage.

ADePT identifies a sequence of activities which minimises the iteration in the design process and ensures any assumptions which the team need to make are ones which can be made with confidence. This is achieved by weighting the dependencies between activities. The calculation of a sequence prioritises the availability of outputs associated with the most critical dependencies. Any interdependent, iterative groups of activities which remain in the process following sequencing are often multi-disciplinary. They represent places in the design process where design team members should work concurrently to solve the interdependent problem. Usually they also represent elements of the product, and therefore of the design output, which require co-ordination.

Having produced a target design plan, the design process needs to be controlled. ADePT incorporates an approach to process control which pre-empts deviation from the target schedule by analysing constraints, which then allows the plan to be kept up-to-date and used in meaningful way.

In Summary, the ADePT methodology and the ADePT Design software suite provides a means of planning, managing and controlling the delivery of a project on the basis of co-ordinated interdisciplinary working. There are many benefits to decision-makers from utilising this approach: the number of assumptions that cannot be made with confidence is minimised; risk and cost implications can be understood and subsequently managed; wasteful iteration can be eliminated; and focus can be given to taking interconnected decisions quickly and effectively. Ultimately, the approach offers a means of planning, controlling, and managing projects in an informed, coherent, and achievable manner.

1.2 Welcome to ADePT Design Builder

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ADePT Design Builder enables Project Managers, Design Managers and Planners to implement the planning stages of the ADePT technique.

Complex iterative design and development processes can be planned by:

- Defining a Work Breakdown Structure (WBS)
- Defining the properties of activities in the process
- Defining the relationships between activities (dependencies)
- Establishing the optimal sequence through the process, identifying iteration and key decisions at the same time
- Breaking down iterative aspects of the process into manageable elements (tearing)
- Ensuring that key milestone dates are achievable
- Creating a bar chart representation of the process

Planned processes can then be monitored and controlled using ADePT Design Manager.

1.3 About this user manual

This user manual describes how each item of functionality in ADePT Design Builder is accessed and executed. Each section covers the reasons for the functionality (why), how it is executed, including any alternative methods (how), and any additional information. The document has been deliberately kept brief (for a user manual), with each section being presented as a series of brief steps supported by screen shots where necessary.

Each section can be read in isolation however the manual is laid out in the order that users should logically follow the functionality of the software, mirroring the steps of the ADePT methodology which the software enables. Therefore the user manual can also be used as a tutorial if necessary (although specific tutorial material is available).

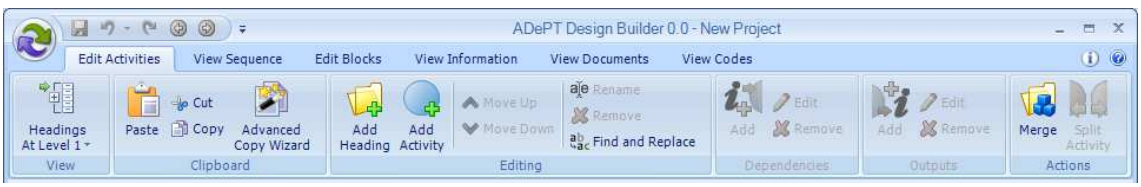
It is recommended that this user manual is used as a reminder, when needed, of the functionality in the software and that initial familiarisation with the software is achieved through the training which is available.

1.4 The basics

Before using this user manual it might be useful to familiarise yourself with the general layout of the software and the terms which are used throughout the manual which relate to layout.

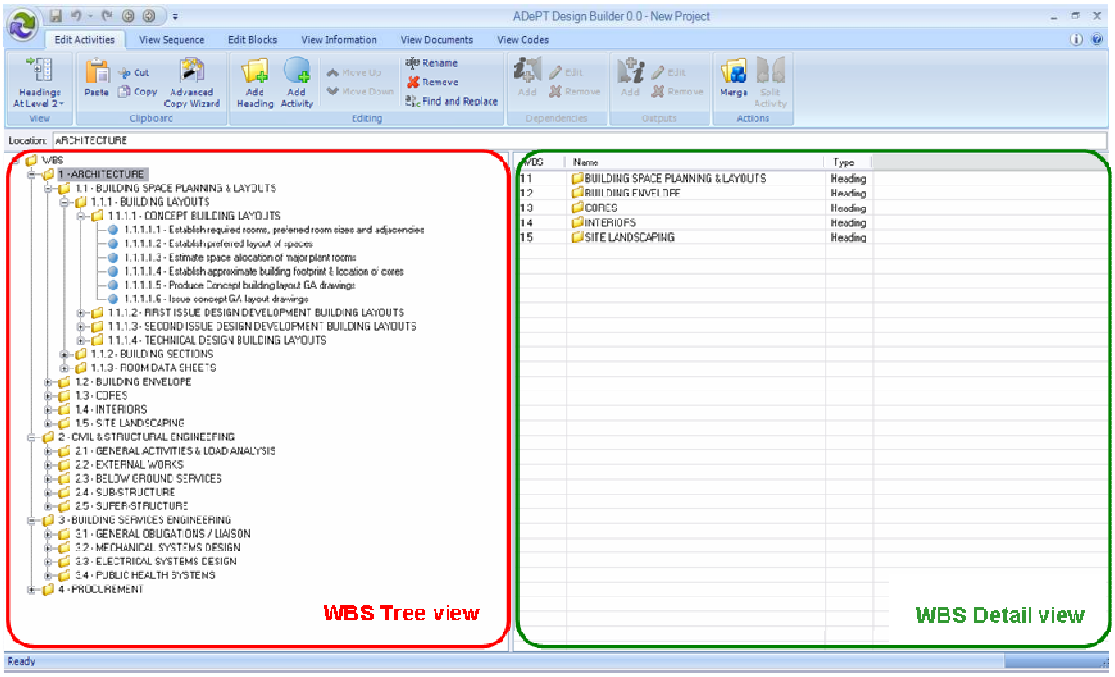
Firstly, the product adopts the latest layout advocated by Microsoft office products, which means that the File menu is not immediately obvious. It can be found by clicking on the circle containing the product icon at the top-left hand corner of the application.

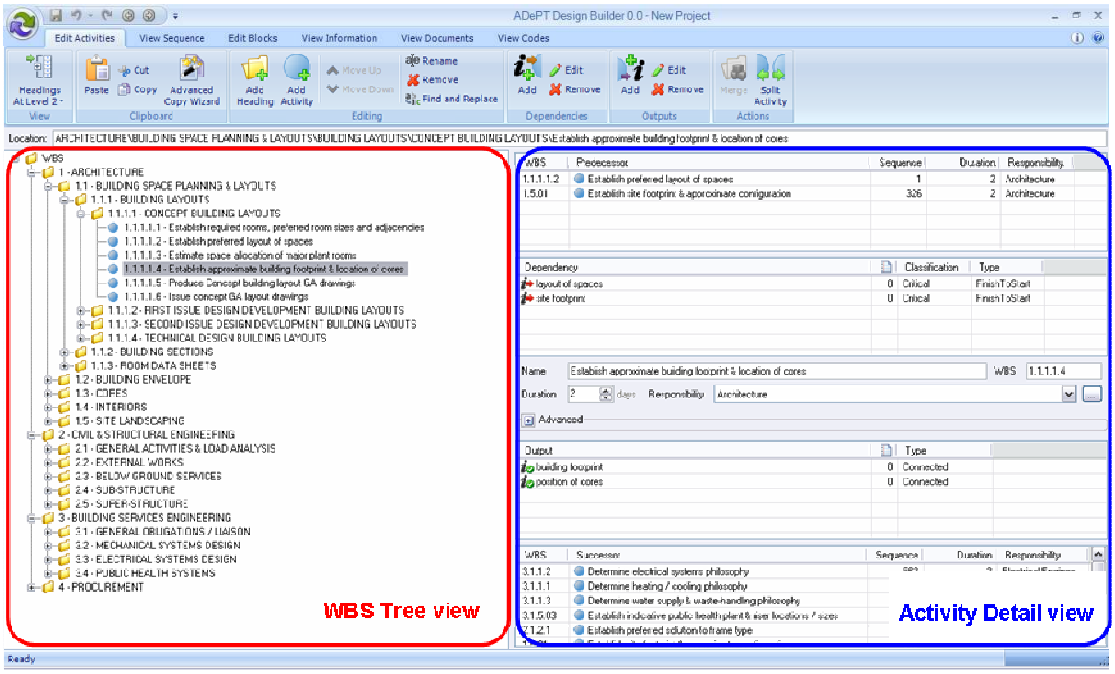
This style of layout works by selecting the appropriate ‘tab’ which in turn provides access to the tools required for the functionality being used. Sometimes you will need to select the correct tab and other times the tab will be selected automatically as you navigate through the software. There are six tabs in ADePT Design Builder: Edit Activities, View Sequence, Edit Blocks, View Information, View Documents and View Codes.



This layout means that useful functions like Save, Undo and Redo, Navigate Back and Forward, and Help (denoted by a question mark) are all available without the need to select a drop-down menu.

Finally, when working in a Work Breakdown Structure (WBS) or activities, the screen is split into two at all times, with the left-hand pane representing the WBS and the right-hand pane representing either the current WBS branch or details of an activity, depending on what is selected in the WBS. The terms WBS Tree view, WBS Detail view and Activity Detail view are used:





CHAPTER 2: MANAGING A PROJECT FILE

This chapter describes how to undertake basic tasks which allow you to manage a project file.

2.1 Create a new blank model file

Why?

Get started defining your design process by adding WBS headings and activities to a blank model.

How?

1. Select New from the File menu and choose Blank Project.

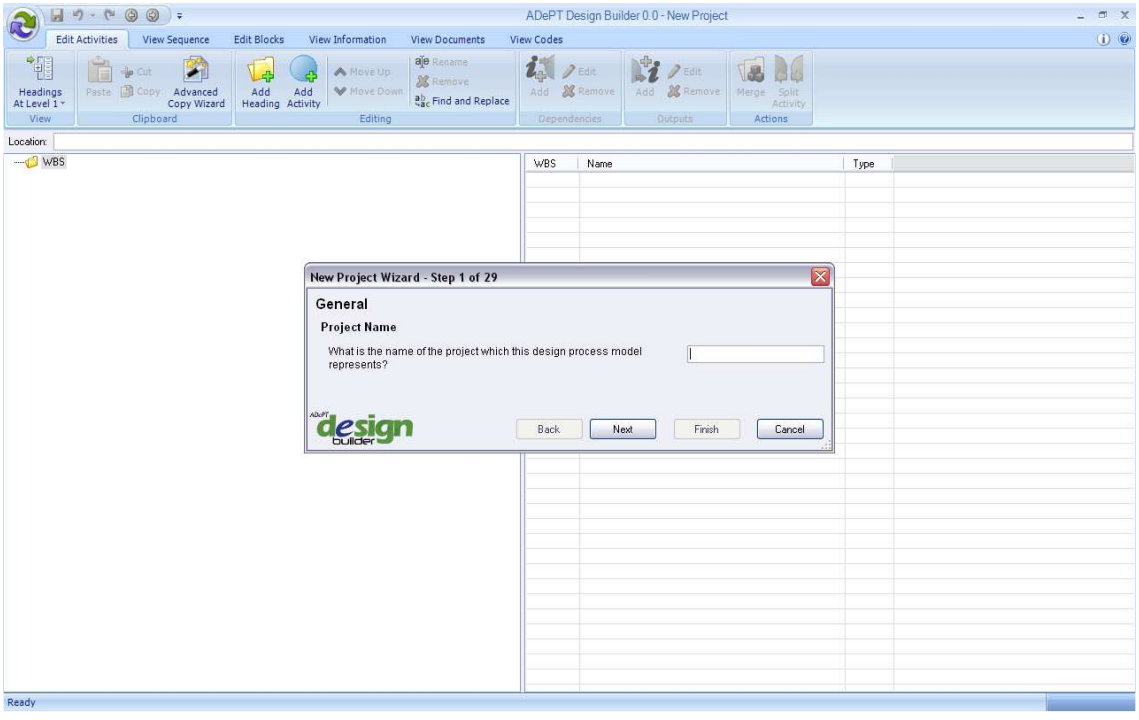
2.2 Create a new model file from an existing template

Why?

Rather than start from scratch, define your design process based on an existing template. This approach can save time by getting the bulk of your design process defined very quickly.

How?

1. Select New from the File menu and choose Project Wizard.
2. Read and accept the terms of use of the chosen project template.
3. Provide answers to the questions which the New Project Wizard asks about your project.



More Information

The Model Wizard will lead you through a series of questions, each one aimed at tailoring a template to suit the design process model required in your project.

2.3 Open an existing model file

Why?

Re-commence work on a model which was saved during a previous session.

How?

1. Select Open from the File menu.
2. Select the desired file from the relevant location in your folder structure.
3. Click on OK.

2.4 Close a file

Why?

Close a model file, either after saving if you wish to re-commence work on it at a later stage, or to reject any changes since your last save.

How?

1. Select Exit from the File menu.

2.5 Save the model file you are working on

Why?

Commit changes since you last saved the file.

How?

1. Select Save from the File menu.

Alternatively; use the short-cut CTRL+S.

2.6 Save a model file under a new name

Why?

Commit changes since you last saved the file and save under a new name.

How?

1. Select Save As from the File menu.
2. Choose the preferred name and location for your file.

2.7 Append an existing model file to your current project file

Why?

Rather than generate sections of WBS which already exist, possibly in other project models, save time by importing them to your project model.

How?

1. Select Import from the File menu.
2. Select Existing Project.
3. Select the location of the existing WBS and choose the relevant file.
4. Click on OK.

More Information

The existing, imported WBS will be appended to the current model WBS under a new heading.

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2.8 Import a data table from MS Excel to a new model file

Why?

Where a model has been defined in tabular form save time by importing it rather than recreating it.

How?

1. Ensure your MS Excel table has been saved in the form of a text (tab delimited) file using Save As from the File menu in MS Excel and changing the file type.
2. Select Import from the File menu.
3. Choose Excel.
4. Select the location and name of the file to be imported.
5. Click on OK.

More Information

The MS Excel table must be configured with columns as follows:

- Activity WBS Number (in the format 1, 1.1, 1.1.1, etc.)
- Activity Name
- Activity Duration
- Activity Effort
- Activity Discipline
- Activity Company
- Activity Role
- Is Milestone? (TRUE or FALSE)
- Activity Stage
- Activity Category
- Dependency (Information Input)
- Predecessor Activity WBS Number
- Dependency Classification

Note that each dependency / predecessor should be entered on a new row in the table.

2.9 Export a model file to an MS Excel data table

Why?

It can be useful to have the model represented in a file format which is easily reviewed by project team members.

How?

1. Select Export from the File menu
2. Choose Excel.
3. Select the location and name of the file to be created.
4. Click on OK.
5. When opening the file in MS Excel, select Open from the File menu and then change the file type to Text File.

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CHAPTER 3: SETTING UP A PROJECT

This chapter explains how to set up project-wide attributes such as design disciplines and documents, so that they can be utilised when defining the project and developing a plan.

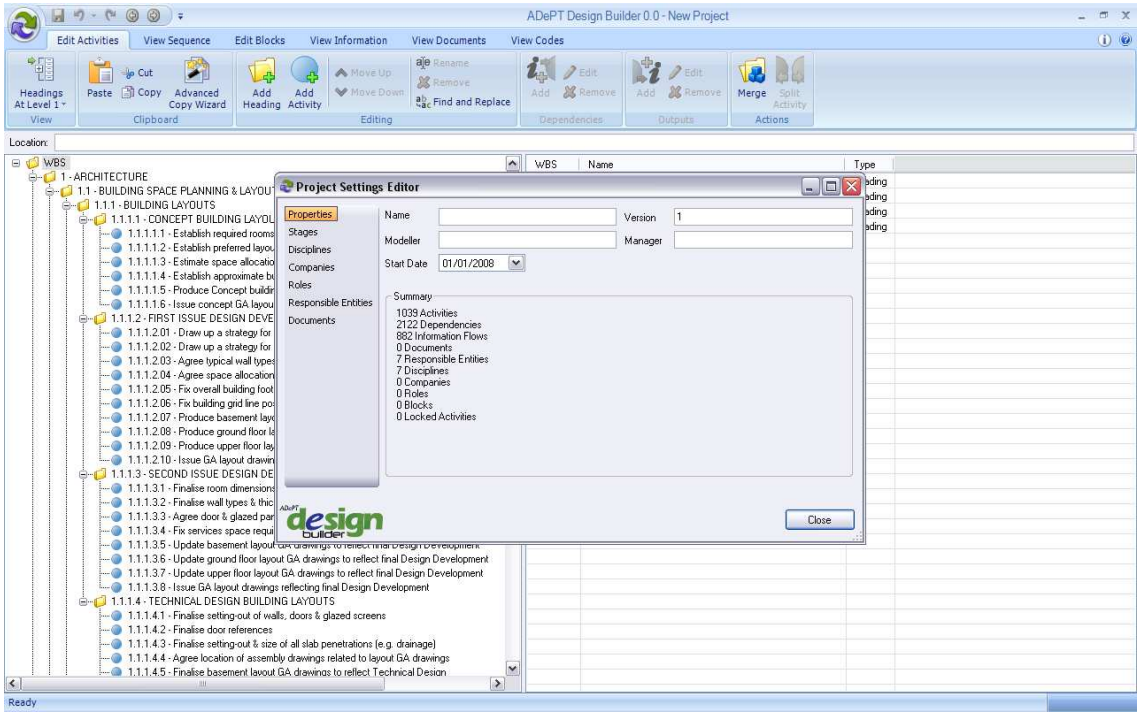
3.1 Rename your model or project within the file

Why?

Represent the name of your project within the model file.

How?

1. Select Project Settings from the File menu.
2. Under Properties enter the project Name.



3.2 Assign responsibilities for modelling and managing the process model or file

Why?

Keep a record of who has overall responsibility on your project for generating the model file and for managing the project.

How?

1. Select Project Settings from the File menu.
2. Enter the Modeller or Manager name.

3.3 Set the project start date and reporting date

Why?

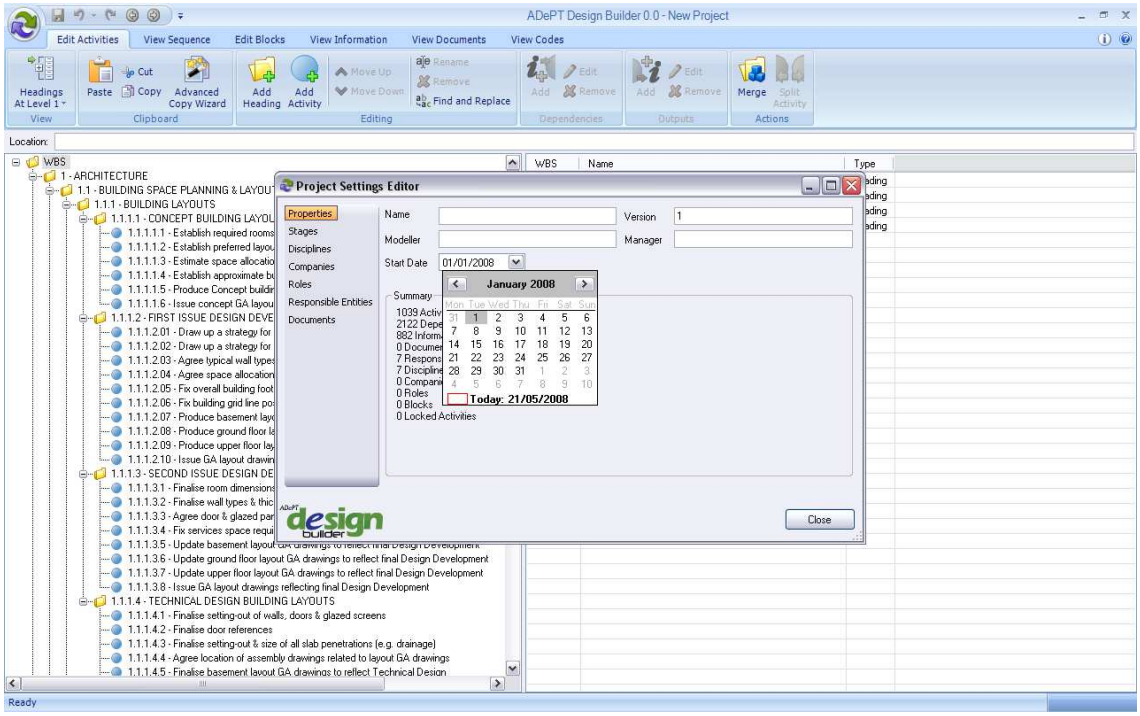
Define the project start date and the date on which the earliest activity in your process can / will commence.

How?

1. Select Project Settings from the File menu.

2. Select the start date on the drop-down calendar or manually enter the date in the format DD/MM/YYYY.

3. Select the report date on the drop-down calendar or manually enter the date in the format DD/MM/YYYY.



More Information

It is important to set the project start and report dates. The report date is required to calculate the activity start and end dates when optimising the activity sequence. Both of these dates are used as part of any synchronisation with a bar chart, and will set the start date and data date in third-party applications.

3.4 Define project stages

Why?

Define stages so that these can then be assigned to activities in your model. When managing your project this will allow bar charts and look-ahead plans to be filtered and sorted by project stage.

How?

1. Select Project Settings from the File menu.

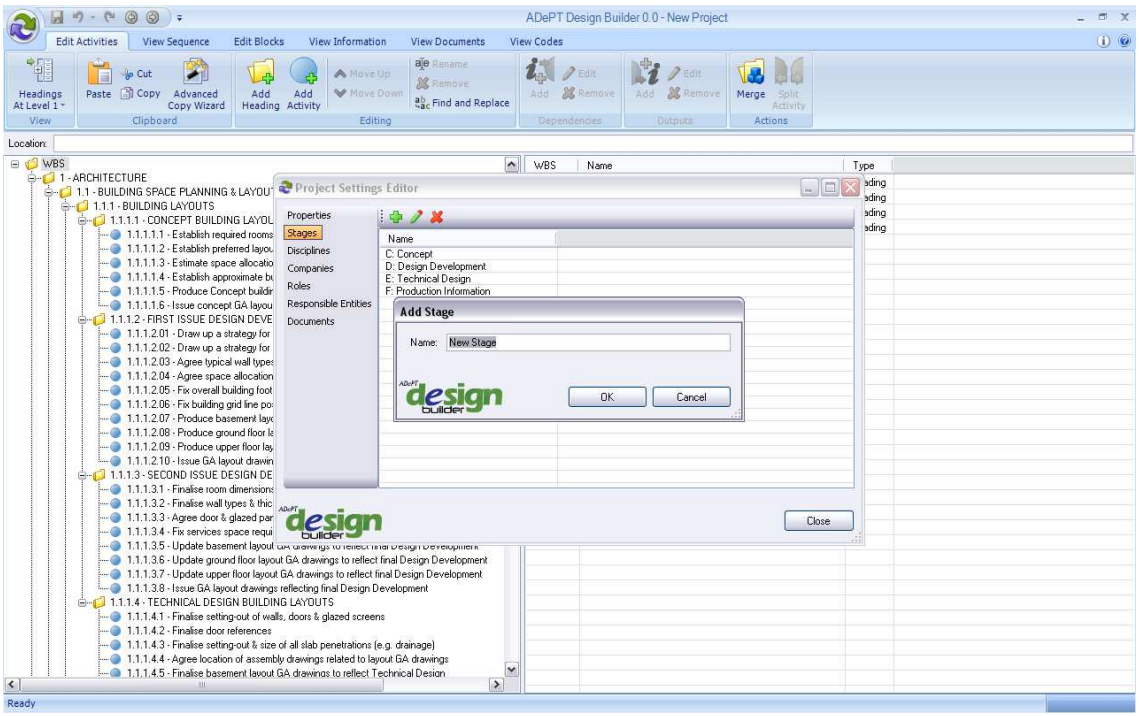
2. Select Stages from the menu.

3. Select the Add button.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

4. Enter the name of the new project stage and select Close.



3.5 Define project team disciplines

Why?

Define disciplines so that these can then be assigned to activities in your model. When managing your project this will allow bar charts and look-ahead plans to be filtered and sorted by discipline.

How?

1. Select Project Settings from the File menu.
2. Select Disciplines from the menu.
3. Select the Add button.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

4. Enter the name of the new project discipline and select Close.

3.6 Define organisations / companies responsible for aspects of the project

Why?

Define companies so that these can then be assigned to activities in your model. When managing your project this will allow bar charts and look-ahead plans to be filtered and sorted by company.

How?

1. Select Project Settings from the File menu.
2. Select Companies from the menu.
3. Select the Add button.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

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4. Enter the name of the new company and select Close.

3.7 Define the roles or people responsible for aspects of the project

Why?

Define roles so that these can then be assigned to activities in your model. When managing your project this will allow bar charts and look-ahead plans to be filtered and sorted by role.

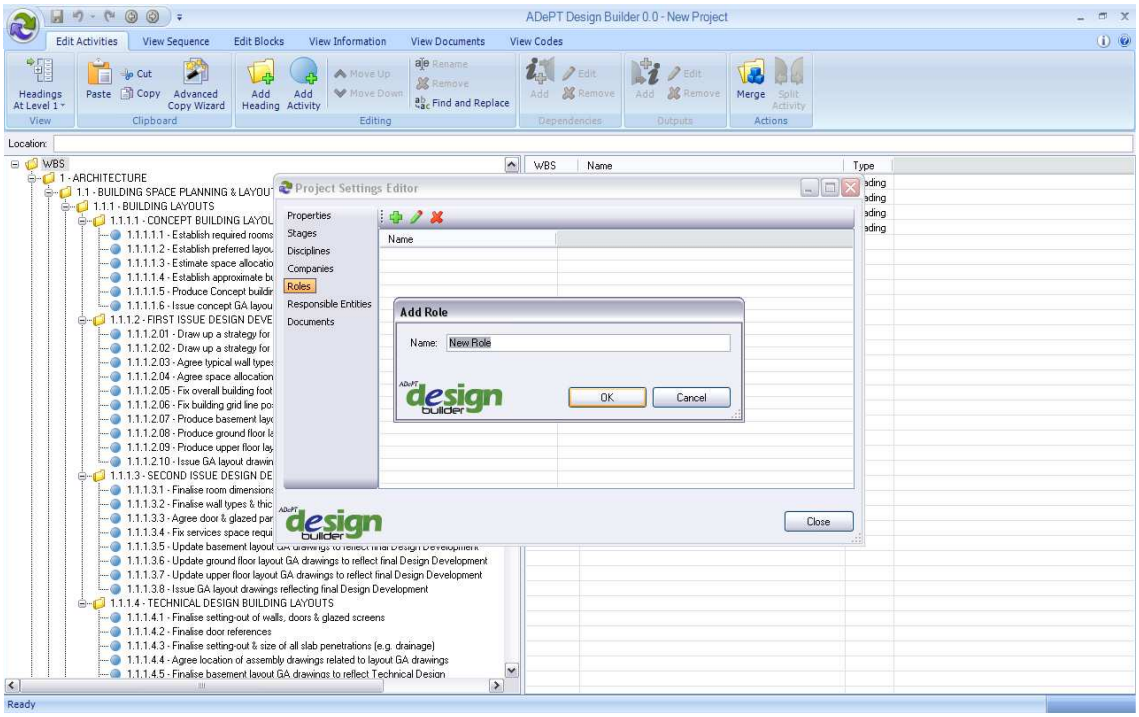
How?

1. Select Project Settings from the File menu.
2. Select Roles from the menu.
3. Select the Add button.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

4. Enter the name of the new project role and select Close.



3.8 View the responsibilities assigned to activities in your model

Why?

In any model, responsibilities are a combination of three activity properties which are defined: discipline; company and role. Viewing the responsibilities will show the current combinations of these three which are allocated to activities.

How?

1. Select Project Settings from the File menu.
2. Select Responsible Entities from the menu.

More Information

The responsibility defined against an activity (as a combination of discipline, company and role) is used at the time of any exported to a planning application to represent resource.

3.9 Assign a day-rate to a responsibility

Why?

Where an effort (man-days) is assigned to an activity, this can be combined with the day-rate of the relevant responsibility to calculate the cost of the activity.

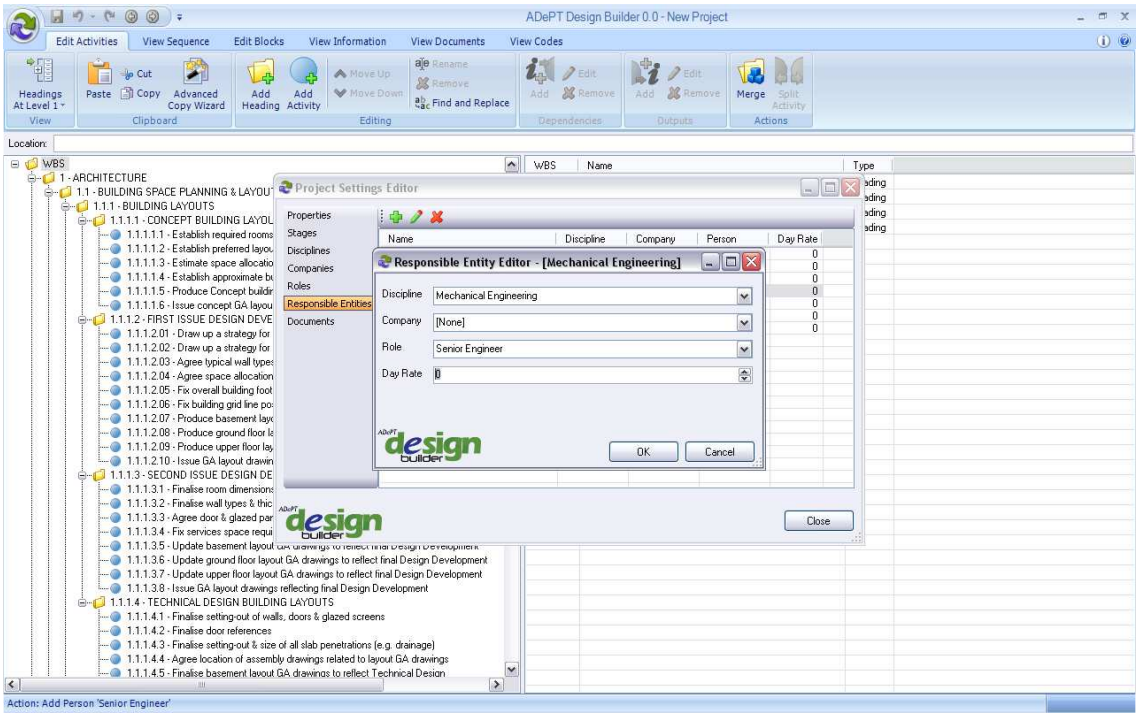
How?

1. Select Project Settings from the File menu.
2. Select Responsible Entities from the menu.
3. Select the Edit button

Alternatively; right click and then select Edit.

Alternatively; use the short-cut key F2.

4. Enter the day rate of the responsibility in the project currency.



More Information

When managing a project it can be useful to monitor progress in terms of work-in-progress, activities completed, documents produced, information produced, and cost incurred, all against the original plan.

See related help topic:

5.6 Assign effort to an activity.

3.10 Set up a calendar for assignment to a responsibility in the project

Why?

Where a responsibility in the project does not work a standard Monday to Friday five-day working week, set up a calendar so that it can be assigned to the relevant responsibility and activity start and end dates can be calculated accurately.

How?

1. Select Project Settings from the File menu.

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2. Select Calendars from the menu.

3. Select the Add button.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

4. Enter the calendar Name.

5. Select the days of each week which are working days using the tick boxes.

6. Add any one-off 'Non-Working' days such as Bank Holidays by right-clicking in the Non Working Days window and selecting Add, then selecting the date from the drop-down calendar and giving the date a name.

Alternatively; one-off non-working days can be imported by selecting the Import button and pasting dates and descriptions into the Preview pane, selecting Preview and then OK. When importing non-working days, the date must be in the format DD Mon YY (e.g. 01 Jan 00) or DD Month YYYY (e.g. 01 January 2000)

7 Add any one-off Exceptions, being dates on days which, although normally non-working, are occasions when one of the design team will be working by right-clicking in the Exceptions window and selecting Add, then selecting the date from the drop-down calendar and giving the date a name.

More Information:

Note that by default, all responsibilities have a calendar assigned which has a five-day working week from Monday to Friday.

If a date is assigned as a Non-Working Day and as an Exception, it will be treated as an Exception (i.e. a working day).

See related help topic:

3.11 Assign a calendar to a responsibility.

3.11 Assign a calendar to a responsibility

Why?

Where a responsibility in the project does not work a standard Monday to Friday five-day working week, assign a calendar to the relevant responsibility so that activity start and end dates can be calculated accurately.

How?

1. Select Project Settings from the File menu.

2. Select Responsible Entities from the menu.

3. Select the relevant responsibility and select Edit.

Alternatively; right-click on the responsibility and select Edit.

4. Select a Calendar from the drop-down menu.

More Information:

See related help topic:

3.10 Set up a calendar for assignment to a responsibility in the project.

3.12 Add project documents to the model

Why?

Documents can be allocated to the outputs of activities. This allows the completeness of activities to be assessed based on the availability of tangible outputs.

How?

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1. Select the View Documents tab.
2. Select Add from the Editing group.

Alternatively; right click and then select Add.

Alternatively; use the short-cut key INSERT.

3. Define the name, number and type of the document.
4. Click OK.

More Information

See related help topics:

3.13 Import project documents to the model.

6.12 Associate an existing project document with an activity output.

6.13 Add a new project document and assign it to an activity output.

3.13 Import project documents to the model

Why?

Documents can be allocated to the outputs of activities. This allows the completeness of activities to be assessed based on the availability of tangible outputs.

How?

1. Select the View Documents tab.
2. Select the Import Documents button on the Actions group.

Alternatively; right click and then select Import.

3. Paste a list of documents into the window - a list can be copied from any application (e.g. MS Word or MS Excel) so long as it contains three columns, either in a table or tab separated, of document number, document name and document type.
4. Select Preview to ensure that the list's columns are recognised.
5. Select OK.

More Information

See related help topics:

3.12 Add project documents to the model.

6.12 Associate an existing project document with an activity output.

6.13 Add a new project document and assign it to an activity output.

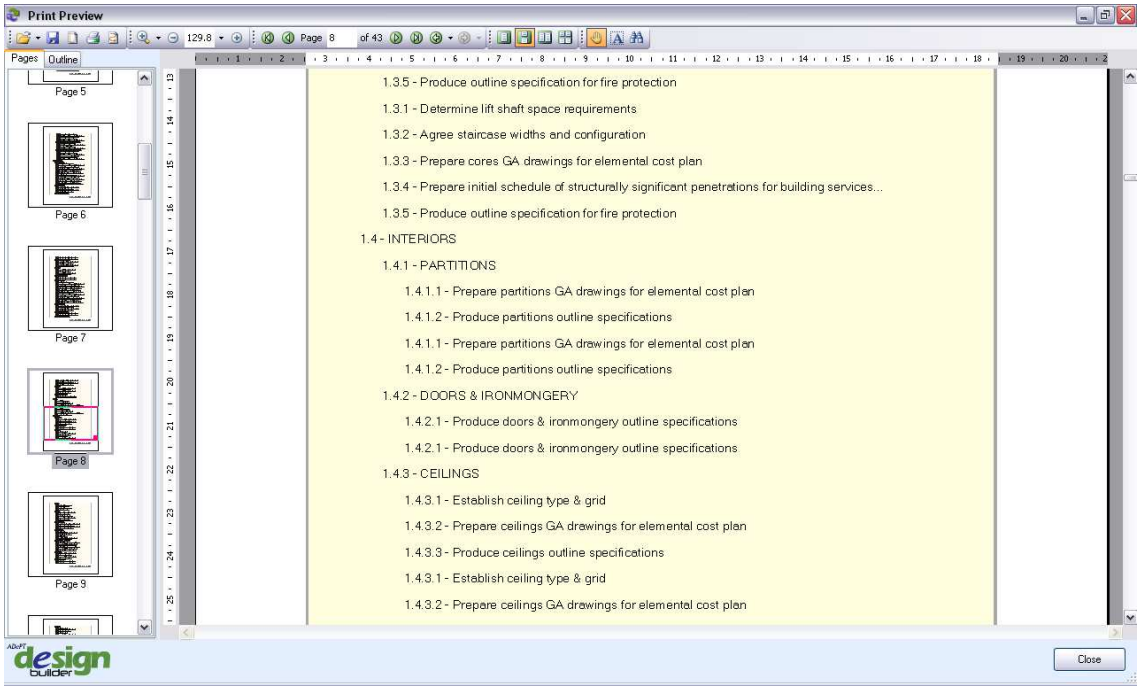
3.14 Preview and print a report

Why?

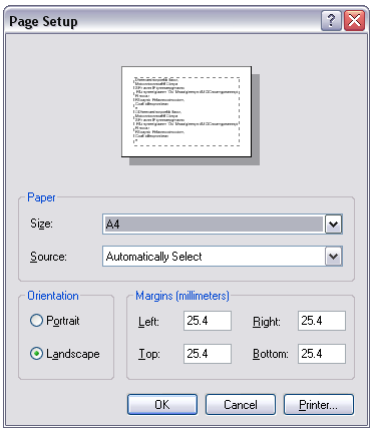
Generate a printed report of a table or graph of progress, constraints or reasons for failure.

How?

1. Select Print from the File menu.
2. Select the relevant report to print.



3. Adjust printer and page settings by selecting Page Setup from the toolbar at the top of the preview window.



4. Select Print from the toolbar at the top of the preview window.

5. Select OK.

CHAPTER 4: SETTING UP A WORK BREAKDOWN STRUCTURE (WBS)

This chapter explains how to set up a project Work Breakdown Structure (WBS).

4.1 Add a new WBS heading to a project model

Why?

Start a new branch in the WBS.

How?

1. Select Add Heading from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree, below which you wish to add the new heading, and select Add Heading.

Alternatively; use the short-cut CTRL+H.

4.2 Rename a heading in the WBS

Why?

Give headings in the WBS names which are relevant to your project.

How?

1. Select Rename from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading and select Rename.

Alternatively; use the short-cut F2.

4.3 Delete a heading or branch from the WBS

Why?

Remove a single heading or entire branch which is not relevant to your project.

How?

1. Select Remove from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading and select Remove.

Alternatively; use the short-cut SHIFT+DELETE.

More Information

Note that when deleting a heading, all other headings and activities below it in the WBS will also be deleted.

Also note that if a heading has been deleted and Undo is selected, the previously removed heading may be added to the bottom of the project WBS.

4.4 Move a heading or branch to a new location in the WBS

Why?

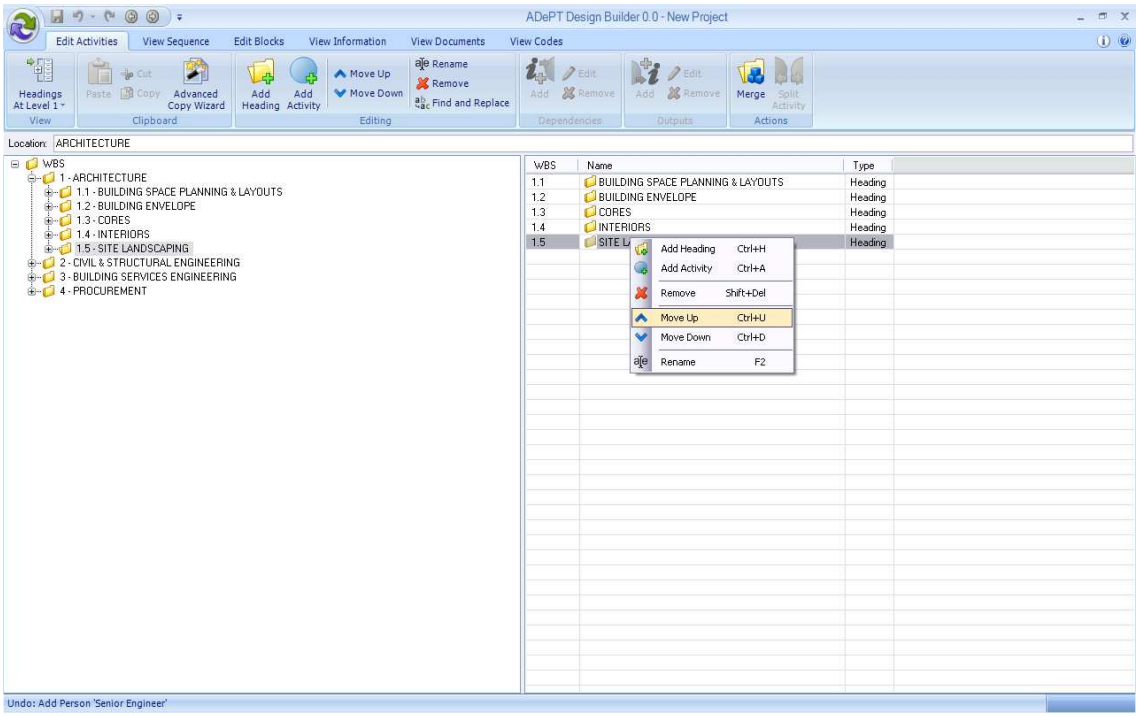
Structure all branches of the WBS in the most relevant way for your project.

How?

1. When a heading is selected in the WBS Detail view (right-hand pane), select Move Up or Move Down from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading in the WBS Detail view and select Move Up or Move Down.

Alternatively; use the short-cuts CTRL+U or CTRL+D when in the WBS Detail view.



More Information

See related help topics:

4.5 Drag and drop a heading or branch to a new location in the WBS.

4.7 Cut a heading or branch of the WBS and position it in a new position.

4.5 Drag and drop a heading or branch to a new location in the WBS

Why?

Structure all branches of the WBS in the most relevant way for your project.

How?

1. Left click on the relevant heading on the WBS Tree and, whilst holding down the left mouse button, drag the branch to a different heading below which you wish to position the branch.

2. Release the left mouse button.

More Information

See related help topic:

4.4 Move a heading or branch to a new location in the WBS.

4.6 Copy a heading or branch of the WBS

Why?

Create a replica of an existing heading or branch, including any dependencies between activities in that branch.

How?

1. Select Copy on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Copy.

Alternatively; use the short-cut CTRL+C when on the WBS Tree.

2. Select the heading, below which you wish to add the replica heading or branch, on the WBS Tree.

3. Select Paste on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Paste.

Alternatively; use the short-cut CTRL+V when on the WBS Tree.

More Information

See related help topic:

4.7 Cut a heading or branch of the WBS and position it in a new position.

4.7 Cut a heading or branch from the WBS and place it in a new position

Why?

Structure all branches of the WBS in the most relevant way for your project.

How?

1. Select Cut on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Cut.

Alternatively; use the short-cut CTRL+X when on the WBS Tree.

2. Select the heading, below which you wish to move the heading or branch to, on the WBS Tree.

3. Select Paste on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Paste.

Alternatively; use the short-cut CTRL+V when on the WBS Tree.

More Information

See related help topics:

4.4 Move a heading or branch to a new location in the WBS.

4.6 Copy a heading or branch of the WBS.

4.8 Copy multiple branches of the WBS at the same time ('advanced copy')

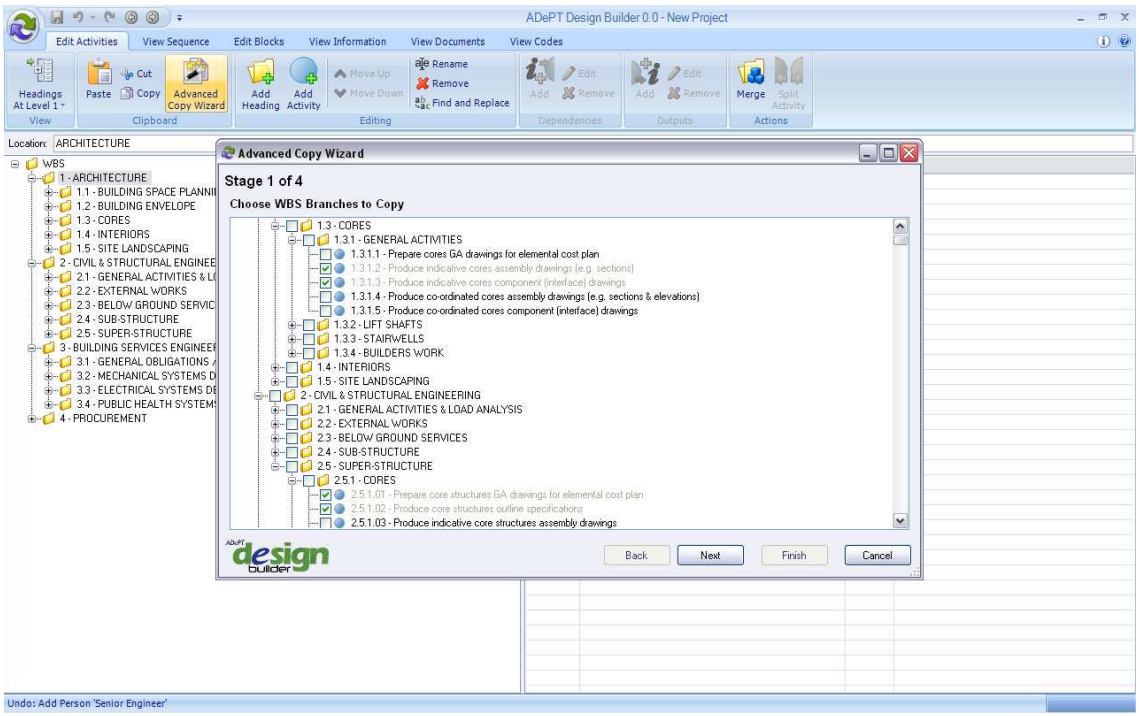
Why?

Create a replica of more than one existing heading or branch, including any dependencies between activities in those multiple branches.

How?

1. Select Advanced Copy Wizard from the Edit Activities tab.

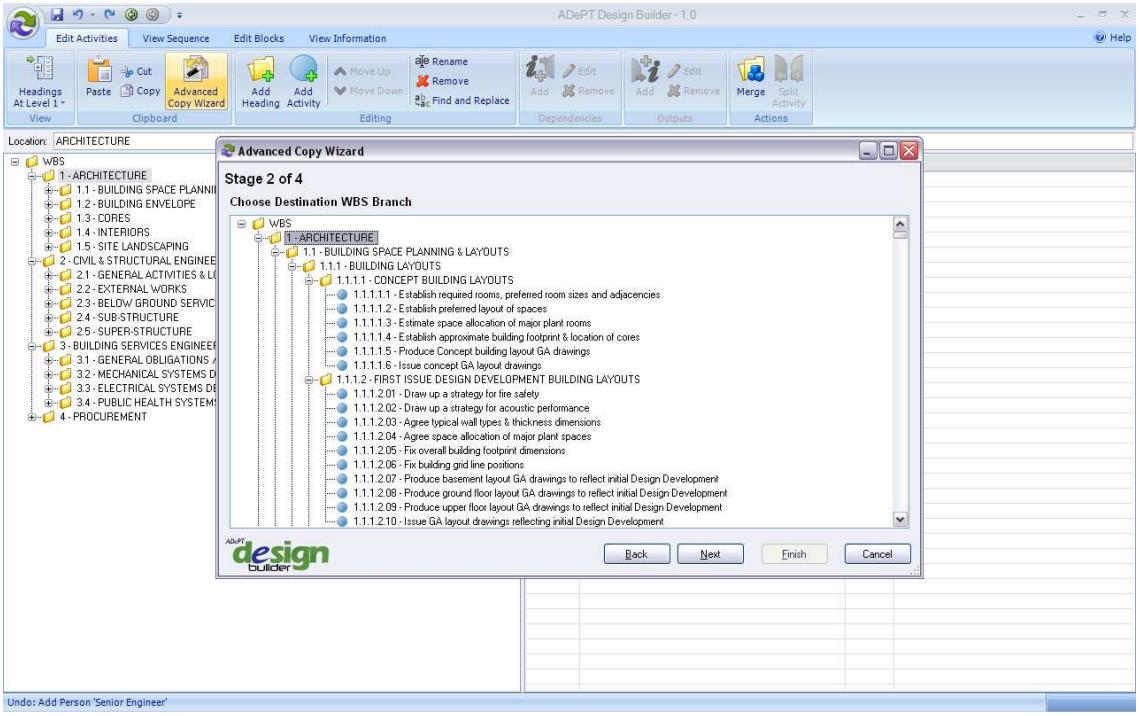
2. In stage 1 of the Wizard, select the activities or branches of WBS which you wish to copy. Note that if a heading is selected all other headings and activities below the selected heading will be automatically selected.



3. Click on Next to be taken to stage 2 of the Advanced Copy Wizard.

4. In stage 2 of the Wizard you will be presented with the existing project WBS. Select the heading beneath which you wish all copied branches and activities to be placed.

Alternatively; right-click on the WBS to add a new heading beneath which you wish all copied branches and activities to be placed.



5. Click on Next to be taken to stage 3 of the Advanced Copy Wizard.

6. In stage 3 of the Wizard you will be presented with the copied activities and branches. The names, outputs and properties of copied activities can be changed before they are pasted into the existing model: right-click on any heading or activity and select Find and Replace or Edit Activities.

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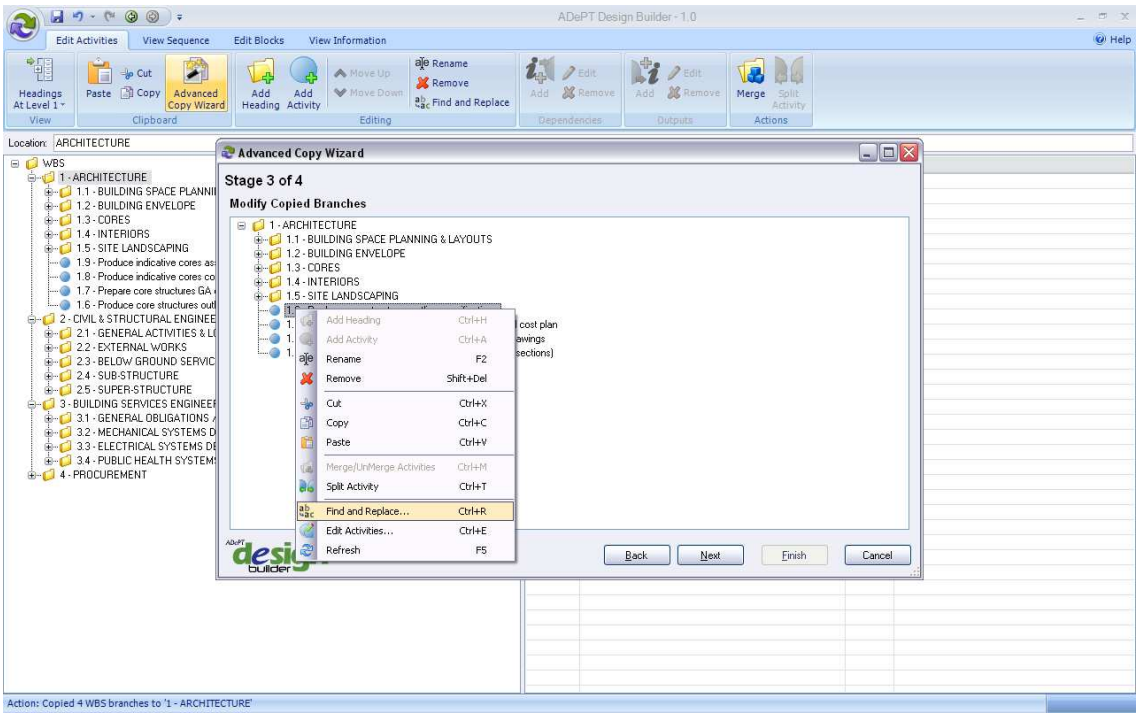
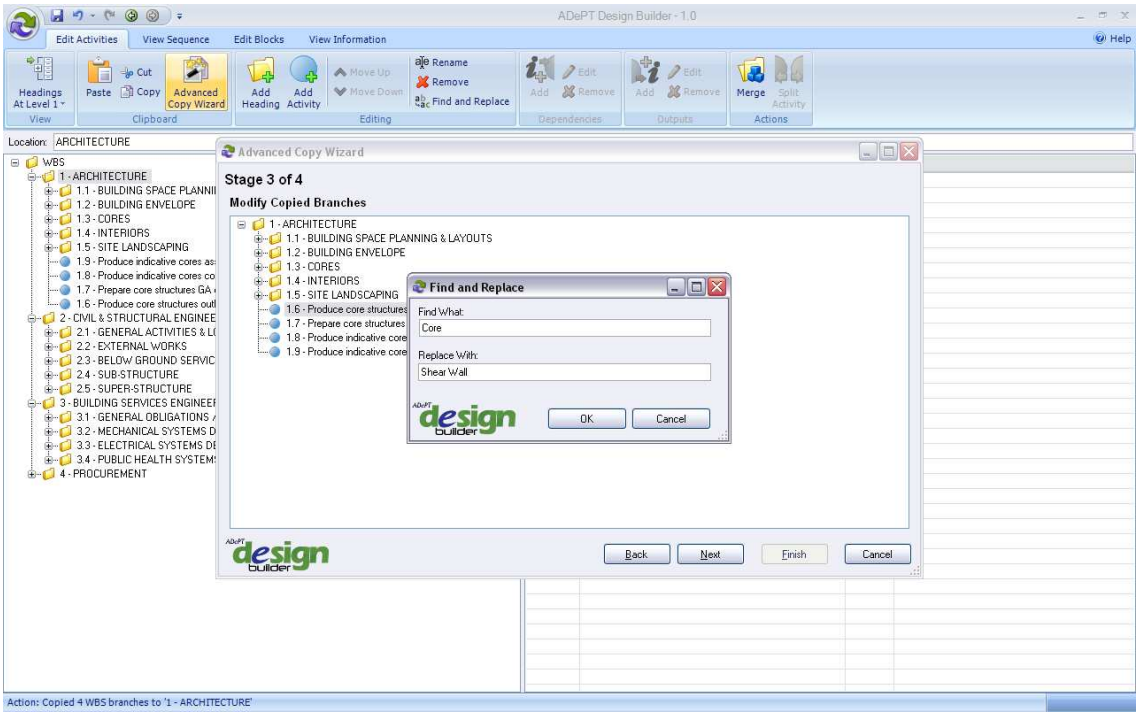
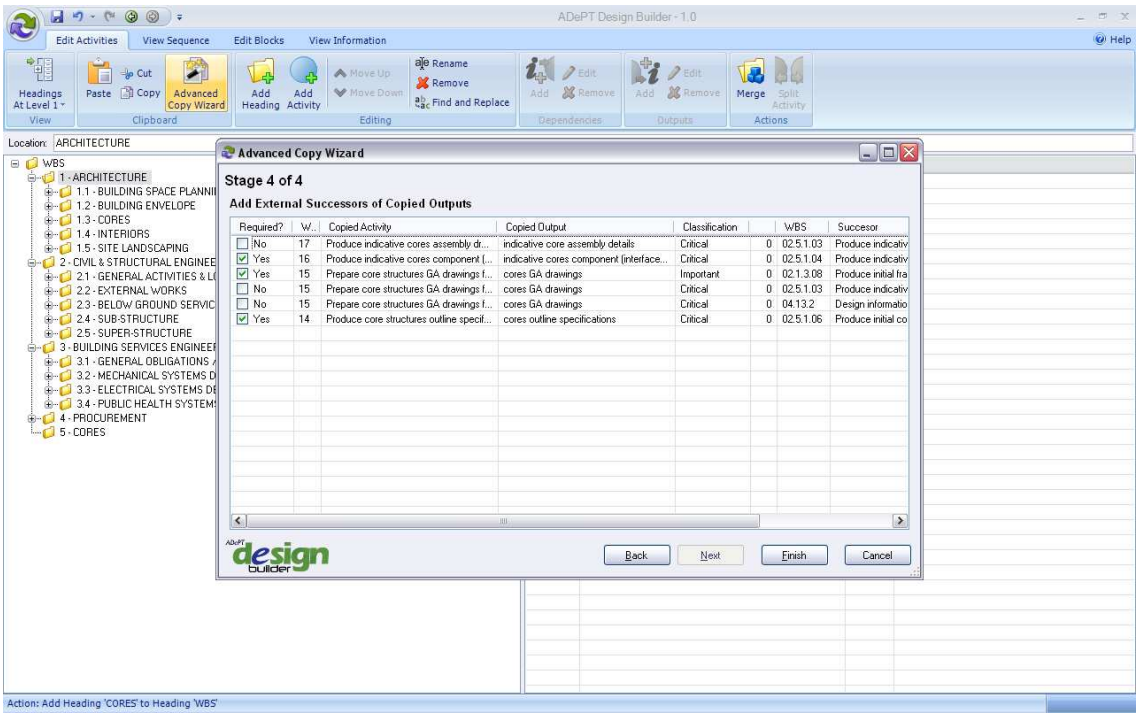


7. Define the replacement term or activity properties – see 4.19 Find & replace a word or term within a branch of the WBS, and 5.9 Assign an activity property to all the activities in a WBS branch.



8. Click on Next to be taken to stage 4 of the Advanced Copy Wizard.

9. Select the outputs from copied activities which feed existing activities in the model (described as 'external' to the copied branch) which you require to be maintained.



10. Click on Finish.

4.9 Merge activities or a branch of the WBS into a heading

Why?

Analyse your project process in a matrix at a summary (heading) level rather than the activity level: the matrix optimisation will be calculated with all dependencies and outputs of activities in the merged branch treated as dependencies and outputs of the merged heading.

How?

1. Select Merge from the Actions Group on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Merge Activities.

Alternatively; use the short-cut CTRL+M when on the WBS Tree.

More Information

Note that where a branch of the WBS is merged, any dependencies between activities within the merged branch will be ignored in any matrix optimisation.

4.10 Add a new activity to a project model

Why?

Define a new activity which is required in your process model.

How?

1. Select Add Activity from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree, below which you wish to add the new activity, and select Add Activity.

Alternatively; use the short-cut CTRL+A.

4.11 Rename an activity in the WBS

Why?

Give activities in the model names which are relevant to your project.

How?

1. Select Rename from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant activity and select Rename.

Alternatively; use the short-cut F2.

More Information

See related help topic:

4.12 Rename an activity in the project model.

4.12 Rename an activity in the project model

Why?

Give activities in the model names which are relevant to your project.

How?

1. Overtype the allocated Name in the Activity Detail view (right-hand pane).

More Information

See related help topic:

4.11 Rename an activity in the WBS.

4.13 Delete an activity from the project model

Why?

Remove an activity which is not relevant to your project.

How?

1. Select Remove from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant activity and select Remove.

Alternatively; use the short-cut SHIFT+DELETE.

More Information

Note that when an activity is deleted, its outputs will be maintained in the model as they may form inputs to other activities. In these cases the inputs would then be shown as 'disconnected outputs', and would need to be connected to an alternative activity.

See related help topics:

6.5 Link an activity's existing output to successor activities.

4.14 Move an activity to a new location in the WBS

Why?

Structure all activities in the WBS in the most relevant way for your project.

How?

1. Select Move Up or Move Down from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant activity in the WBS Detail view and select Move Up or Move Down.

Alternatively; use the short-cuts CTRL+U or CTRL+D when in the WBS Detail view.

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More Information

See related help topic:

4.17 Cut an activity and position it in a new position.

4.15 Drag and drop an activity to a new location in the WBS

Why?

Structure all activities in the WBS in the most relevant way for your project.

How?

1. Left click on the relevant activity on the WBS Tree and, whilst holding down the left mouse button, drag the activity to a different heading below which you wish to position the activity.
2. Release the left mouse button.

More Information

See related help topic:

4.14 Move an activity to a new location in the WBS.

4.16 Copy an activity in the project model

Why?

Create a replica of an existing activity, including any dependencies between that and other activities.

How?

1. Select Copy on the Edit Activities tab.

Alternatively; right-click on the relevant activity on the WBS Tree and select Copy.

Alternatively; use the short-cut CTRL+C when on the WBS Tree.

2. Select the heading, below which you wish to add the replica activity, on the WBS Tree.
3. Select Paste on the Activity tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Paste.

Alternatively; use the short-cut CTRL+V when on the WBS Tree.

More Information

See related help topics:

4.18 Create a duplicate activity in the WBS (split).

4.17 Cut an activity and position it in a new position.

4.17 Cut an activity and position it in a new position.

Why?

Structure all activities in the WBS in the most relevant way for your project.

How?

1. Select Cut on the Edit Activities tab.

Alternatively; right-click on the relevant activity on the WBS Tree and select Cut.

Alternatively; use the short-cut CTRL+X when on the WBS Tree.

2. Select the heading, below which you wish to move the activity to, on the WBS Tree.
3. Select Paste on the Activity tab.

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Alternatively; right-click on the relevant heading on the WBS Tree and select Paste.

Alternatively; use the short-cut CTRL+V when on the WBS Tree.

More Information

See related help topics:

4.14 Move an activity to a new location in the WBS.

4.16 Copy an activity in the project model.

4.18 Create a duplicate of an activity in the WBS (split)

Why?

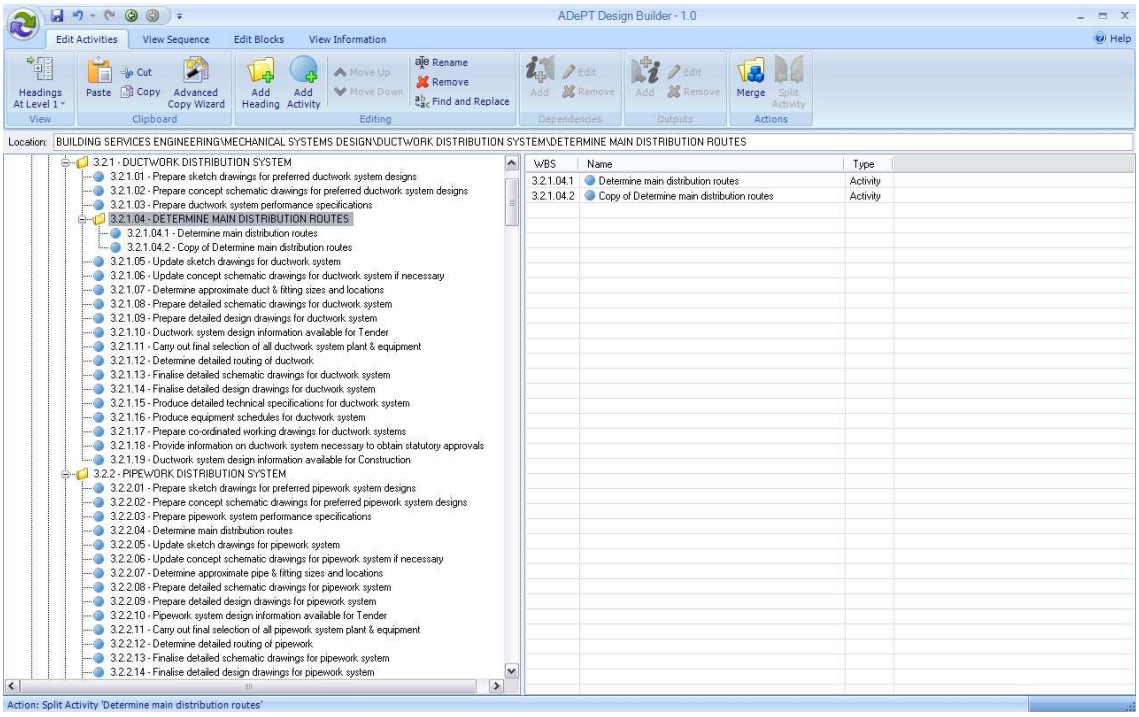
If you wish to break down an existing activity in the WBS, rather than create an entirely new activity, you can create a duplicate of the activity and then go on to select the appropriate dependencies from those which are already defined.

How?

1. Select Split Activity on the Edit Activities tab.

Alternatively; right-click on the relevant activity on the WBS Tree and select Split Activity.

Alternatively; use the short-cut CTRL+T when on the WBS Tree.



More Information

Where an activity is split, a new heading is created in place of the existing activity and the existing activity is placed beneath that heading in the WBS along with the duplicate activity. The duplicate activity is automatically named as a copy of the existing activity. The duplicate activities can be moved within the WBS or the new heading can be renamed to maintain the most relevant WBS structure.

Note that the duplicate activity has all the same inputs and predecessors as the existing activity, and it has all the same outputs defined. However the successors are not defined and, as a result, the outputs are described as 'disconnected'. They must be removed or connected to the relevant successor.

4.19 Find & replace a word or term within a branch of the WBS

Why?

Replace a word or term which occurs in a branch of the WBS at every point where it appears, thus making wholesale changes very quickly.

How?

1. Select Find and Replace from the Editing group on the Edit Activities tab.

Alternatively; right-click on the relevant heading on the WBS Tree and select Find and Replace.

Alternatively; use the short-cut CTRL+R when on the WBS Tree.

2. Enter the existing word or term, in the correct case, and its replacement.

3. Click OK

More Information

Find and Replace is particularly useful where a branch has been copied and a wholesale renaming is required.

Note that when a word or term is replaced, not only are headings and activities in the chosen WBS branch changed but outputs from activities in the chosen branch are also changed where they contain the word or term.

Also note that Find and Replace preserves the case of the word or term, whether that be CAPITALS, Sentence Case, or lower case.

CHAPTER 5: DEFINING THE CHARACTERISTICS OF ACTIVITIES

This chapter explains how to define all properties of activities. This includes any project-wide attributes which have been defined.

5.1 Assign a duration to an activity

Why?

Set the period over which an activity will be worked on so that this timescale is used when calculating activity start and finish dates, including in any planning software which your model will be exported to.

How?

1. Select the Duration in the Activity Detail view using the up and down arrows.

Alternatively; overtype the Duration in the Activity Detail view.

More Information

Note that durations can only be assigned to activities in whole days.

5.2 Create a new responsibility and assign it to an activity

Why?

Create and allocate a responsibility to an activity so that tasks in Workplans in ADePT Design Manager and on a bar chart can be filtered by responsibility.

How?

1. Select the […] button against Responsibility in the Activity Detail view.
2. Enter the Discipline, Company and Role responsible for the activity, either by selecting from the drop-down lists or by overtyping the existing entries.
3. Enter the day-rate of the responsibility (if known).
4. Click OK.

More Information

See related help topics:

5.3 Assign an existing responsibility to an activity.

3.5 Define project team disciplines.

3.6 Define organisations / companies responsible for aspects of the project.

3.7 Define the roles or people responsible for aspects of the project.

5.3 Assign an existing responsibility to an activity

Why?

Allocate a responsibility to an activity so that tasks in Workplans in ADePT Design Manager and on a bar chart can be filtered by responsibility.

How?

1. Select the Responsibility in the Activity Detail view using the drop-down list.

More Information

See related help topic:

5.2 Create a new responsibility and assign it to an activity.

5.4 Add a description to an activity

Why?

Make the scope of each activity clear by adding a detailed description.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Enter a Description.

5.5 Assign an activity as a milestone

Why?

Note an activity as a milestone so that it will be shown as such when exported to a bar chart.

How?

1. Select either Start Milestone or Finish Milestone from the 'Type' drop-down menu in the Activity Detail view.

More Information

Note that when an activity is assigned as a milestone, the duration and effort default to 0 since milestones are simply moments in time and cannot have duration or effort allocated.

5.6 Assign an activity as 'highlighted' for special attention

Why?

Note an activity as a special case so that it will be shown as such when monitored with the ADePT Design Manager tool.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Select the tick box marked Highlighted.

More Information

Note that reports of highlighted activities can be created in ADePT Design Manager so that these activities can be tracked.

5.7 Assign progress (% complete) to an activity

Why?

Assign current known progress so that subsequent activities' start and finish dates can be calculated accurately.

How?

1. Select the Progress [+] option in the Activity Detail view.
2. Select the tick box marked Started, to indicated that the activity has begun, and select the date on which the activity started from the drop-down calendar.
3. If the activity is complete, select the tick box marked Finish.
4. Select the actual, or expected, completion date from the drop-down calendar.

More Information:

Note that the drop-down calendars on start and finish dates only become available after the activities have been scheduled in the View Sequence tab.

Having entered progress, optimise the activity sequence to see the effect of progress on other activities' start and finish dates by selecting Reschedule on the View Sequence tab.

5.8 Assign a time constraint to an activity

Why?

Assign a time constraint when an activity must happen on, before, or after a known date.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Select the tick box marked Time Constraint.
3. Select the Time Constraint Type using the up/down arrows.
4. Select the Time Constraint Date from the drop-down calendar.

More Information:

Time constraints can be of the following types:

- Start On or Before – must not start later than the assigned date
- Start On – must start on the assigned date
- Start On or After – must not start earlier than the assigned date
- Finish On or Before – must not finish later than the assigned date
- Finish On – must finish on the assigned date
- Finish On or After – must not finish earlier than the assigned date

See related help topic:

Observe whether an activity's dates comply with an assigned time constraint.

5.9 Assign effort to an activity

Why?

Where an effort is assigned to an activity, this can be combined with the day-rate of the relevant responsibility to calculate the cost of the activity.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Enter Effort in man-days.

More Information

When managing a project it can be useful to monitor progress in terms of work-in-progress, activities completed, documents produced, information produced, and cost incurred, all against the original plan.

See related help topic:

3.9 Assign a day-rate to a responsibility.

5.10 Assign an activity category to an activity

Why?

Allocate an activity category to an activity so that tasks in Workplans in ADePT Design Manager and on a bar chart can be filtered by category.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Select an Activity Category from those available using the up and down arrows.

5.11 Assign a project stage to an activity

Why?

Allocate a project stage to an activity so that tasks in Workplans in ADePT Design Manager and on a bar chart can be filtered by stage.

How?

1. Select the Advanced [+] option in the Activity Detail view.
2. Select a Project Stage from the drop-down list.

5.12 Assign an activity property to all the activities in a WBS branch

Why?

Rather than allocate properties to activities individually, assign them to all activities in a branch of the WBS.

How?

1. Right-click on the relevant heading on the WBS Tree and select Edit Activities.

Alternatively; use the short-cut CTRL+E when on the WBS Tree.

2. Select the tick box against the property (or properties) which are to be allocated.
3. Enter the value of each property or select from drop-down lists.
4. Click OK.

More Information

See related help topics:

5.1 Assign a duration to an activity.

5.3 Assign an existing responsibility to an activity.

5.2 Create a new responsibility and assign it to an activity.

5.4 Add a description to an activity.

5.7 Assign an activity category to an activity.

5.8 Assign a project stage to an activity.

5.13 Set up and associate 'codes' with activities

Why?

Additional properties of activities can be set up and assigned to activities so that a bar chart can be sorted and filtered by those properties.

How?

1. Select the View Codes tab.
2. Select Add Type and enter a type of property.
3. Highlight the Type from the tree in the left-hand pane.
4. Select Add Value and enter an acceptable value for the code type.
5. Highlight the value from the tree in the left-hand pane.
6. Select Add to Code on the Activities group.
7. Use the tick boxes to select any activity which should have the chosen value assigned to it.

More Information:

Each Code Type will have a Value of [None] automatically assigned. Selecting this value will show whether there are any activities in the model which do not yet have an alternative value assigned to them.

CHAPTER 6: DEFINING ACTIVITY DEPENDENCIES

6.1 Add dependencies and predecessors to an activity

Why?

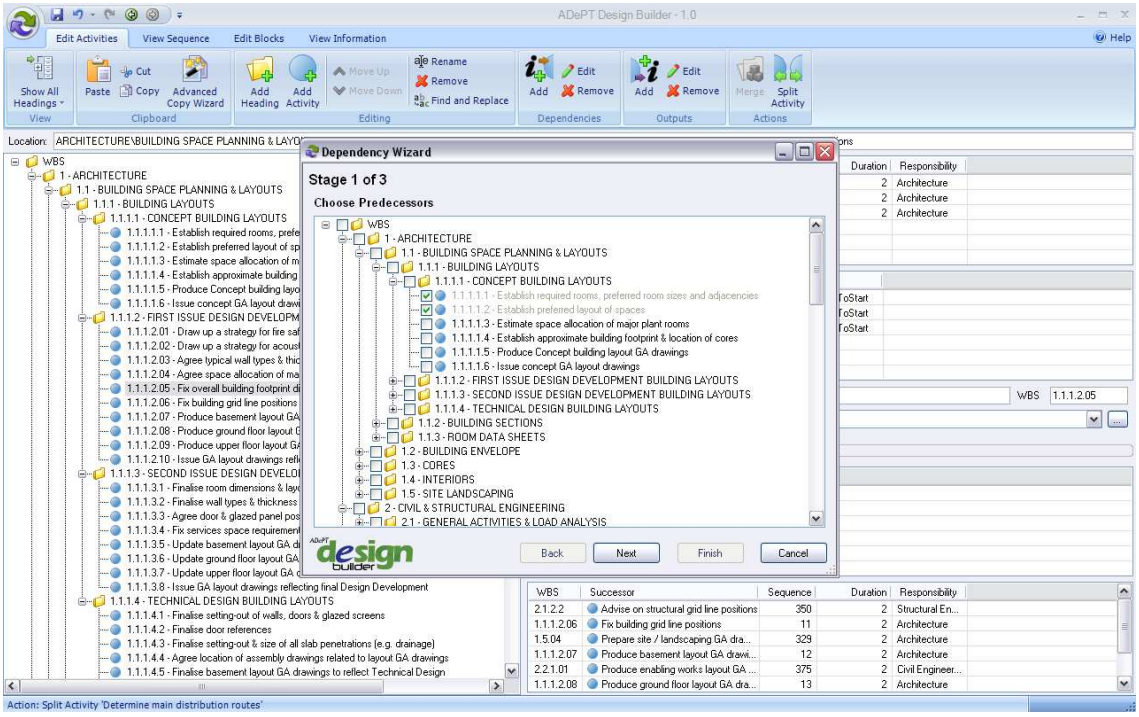
Define dependencies between the selected activity and other activities so that the optimal sequence can be calculated based on the dependencies.

How?

1. Select Add from the Dependencies group on the Edit Activities tab.

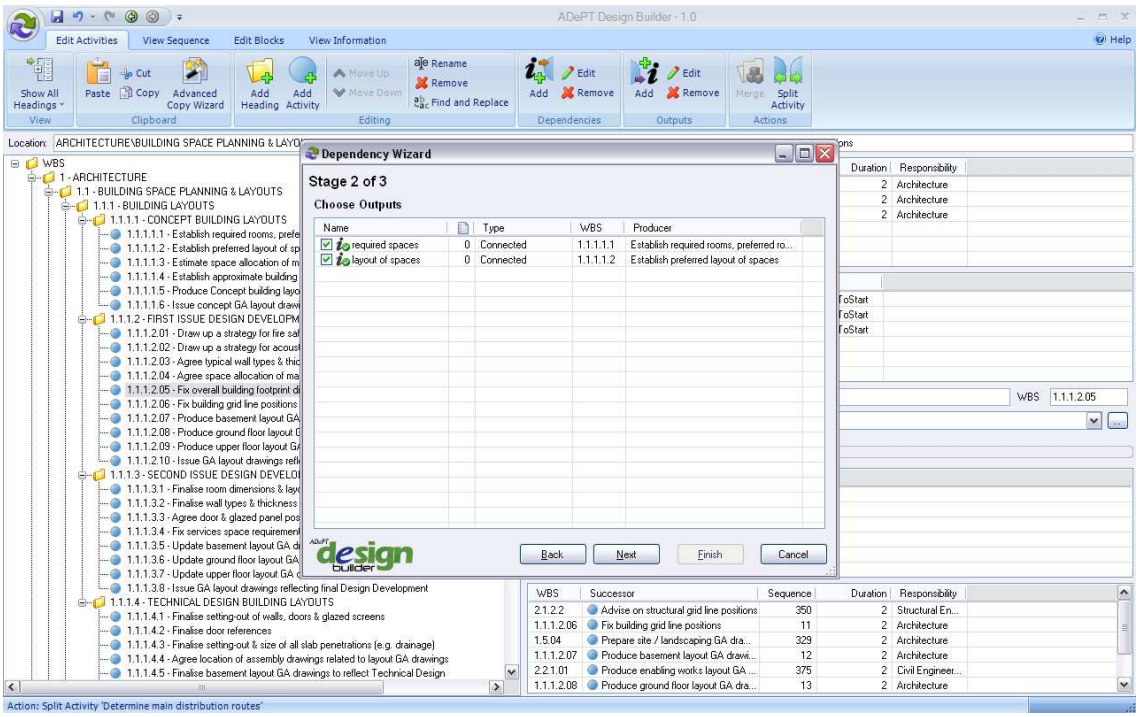
Alternatively; right-click on the Predecessor or Dependency section of the Activity Detail view and select Add or use the short-cut key INSERT.

2. At step 1 on the Dependency Wizard, select the relevant predecessor activities from the WBS.



3. Click on Next to move to stage 2 of the Wizard.

4. At step 2 on the Dependency Wizard, select the relevant outputs from existing outputs or the new ones which have been defined as 'Information from ....'.



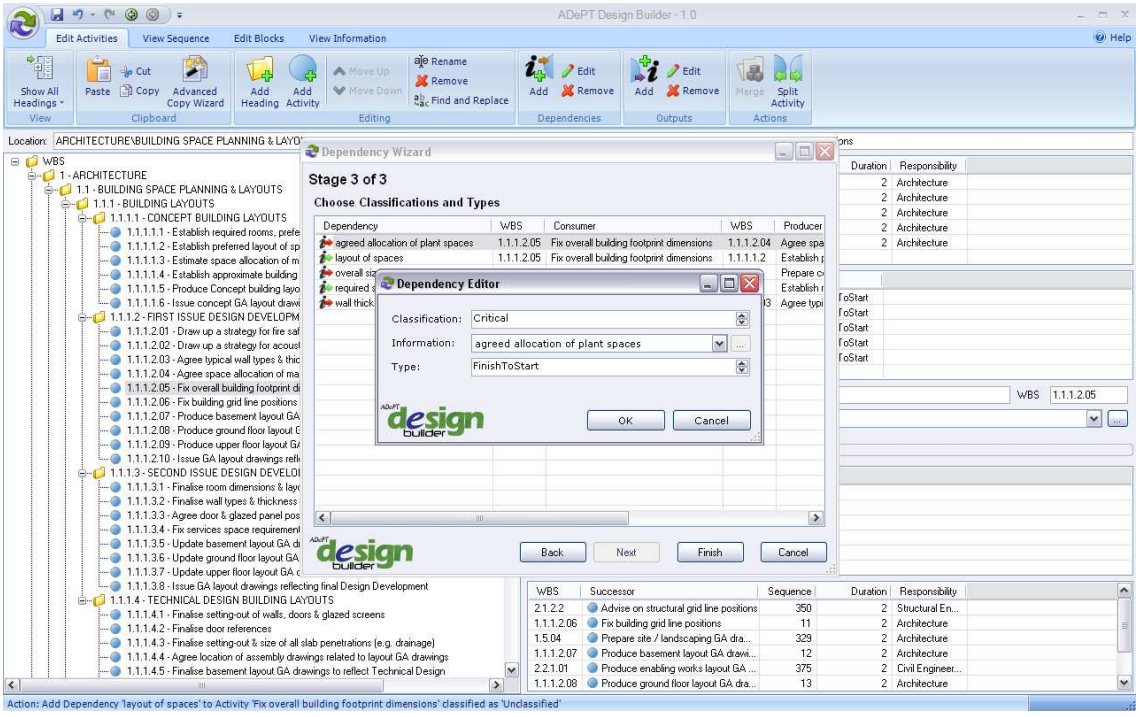
5. To edit any Information name, right-click on the dependency and select Edit.

Alternatively; select the dependency and use the short-cut F2.

6. Click on Next to move to stage 3 of the Wizard.

7. At step 3 on the Dependency Wizard, to edit any dependency classification and type, right-click on the dependency and select Edit.

Alternatively; select the dependency and use the short-cut F2.



8. Select the Classification of the dependency from the options available using the up and down arrows.

9. Set the dependency Type from the options available using the up and down arrows.

10. Click Finish.

6.2 Add a single dependency and predecessor to an activity

Why?

Define dependencies between the selected activity and other activities so that the optimal sequence can be calculated based on the dependencies.

How?

1. Left click on the relevant predecessor on the WBS Tree and, whilst holding down the left mouse button, drag the branch to the Predecessor or Dependency section of the Activity Detail view.
2. Select the Classification of the dependency from the options available using the up and down arrows.
3. Enter the Information name by selecting from the successor's existing outputs in the drop-down list or by overtyping the entry.
4. Set the dependency Type from the options available using the up and down arrows.
5. Click OK.

6.3 Add a new output and successor to an activity

Why?

Define outputs, from the selected activity, to other activities so that the optimal sequence can be calculated based on the dependencies.

How?

1. Left click on the relevant successor on the WBS Tree and, whilst holding down the left mouse button, drag the branch to the Successor or Output section of the Activity Detail view.
2. Select the Classification of the dependency from the options available using the up and down arrows.
3. Enter the Information name by selecting from the activity's existing outputs in the drop-down list or by selecting the […] button.
4. Set the dependency Type from the options available using the up and down arrows.
5. Click OK.

6.4 Add a new output from an activity

Why?

Define outputs from the selected activity, which can then be linked to successor activities, so that the optimal sequence can be calculated based on the dependencies.

How?

1. Select Add from the Outputs group on the Edit Activities tab.

Alternatively; right-click on the Output section of the Activity Detail view and select Add.

2. Enter the Information name.
3. To associate project documents with the output, right-click on the Documents section and select Add.
4. Select from the drop-down list of existing documents or define new documents using the […] button.
5. Click OK twice.

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More Information

See related help topic:

6.5 Link an activity's existing output to successor activities.

6.5 Link an activity's existing output to successor activities

Why?

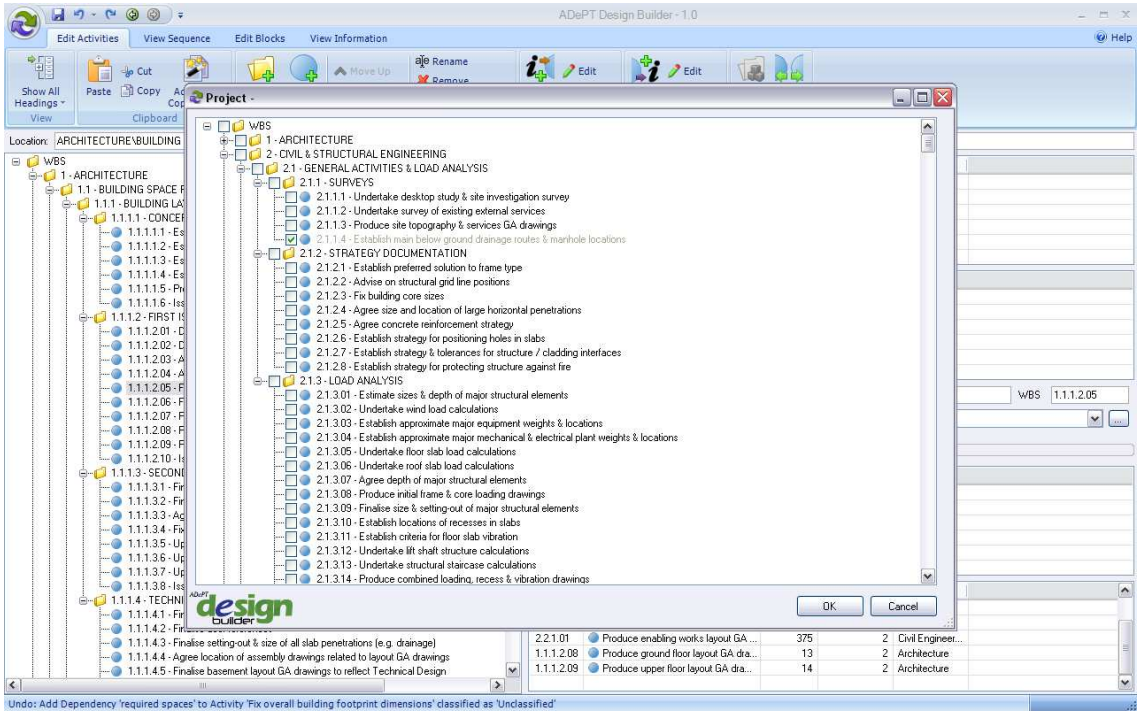
Where an activity's outputs have been defined but not its successors, link the outputs to the relevant successors so that the optimal sequence can be calculated based on the dependencies.

How?

1. Right-click on the output in the Activity Detail view and choose Select Successors.

Alternatively; right- click on the information in the View Information tab and choose Select Successors.

2. Select the required successors from the WBS.
3. Click OK.



More Information

Where outputs are connected to successors, they will be given a critical Classification and a Type of Finish-to-Start by default.

Also note that where outputs are defined but have not been linked to successor activities, they are described as 'disconnected'.

6.6 Rename an output from an activity

Why?

Give outputs the most relevant names for the activities in your projects.

How?

1. Select Edit from the Outputs group on the Edit Activities tab.

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Alternatively; right-click on the output in the Output section of the Activity Detail view and select Edit (or use the short-cut F2).

Alternatively; select the information in the View Sequence tab and choose Edit Information.

Alternatively; right-click on the information in the View Sequence tab and choose Edit (or use the short-cut F2).

2. Enter the new output name.

3. Click OK.

More Information

Note that when an output name is changed, where that output is an input to other activities then the input / dependency name is also changed.

6.7 Change a dependency classification

Why?

Give dependencies the most appropriate classification so that the optimal sequence can be calculated based on the dependency classifications.

How?

1. Select the dependency and select Edit from the Dependencies group on the Edit Activities tab.

Alternatively; right-click on the dependency or predecessor in the Dependency or Predecessor section of the Activity Detail view and select Edit (or use the short-cut F2).

2. Select the required Classification using the up and down arrows.

3. Click OK.

6.8 Change a dependency type

Why?

Ensure that all dependencies are of the correct type so that they are represented correctly in a bar chart.

How?

1. Select the dependency and select Edit from the Dependencies group on the Edit Activities tab.

Alternatively; right-click on the dependency or predecessor in the Dependency or Predecessor section of the Activity Detail view and select Edit (or use the short-cut F2).

2. Select the required Dependency Type using the up and down arrows.

3. Click OK.

6.9 Allocate lag to a dependency between two activities

Why?

In some circumstances an activity does not need to wait until its predecessor is completed but can start some time before that point. On other occasions, an activity might have to wait until after the point where its predecessor is completed. On both of these occasions a lag can be applied to the dependency (with a negative number in the first circumstance and a positive number in the second).

How?

1. Select the dependency and select Edit from the Dependencies group on the Edit Activities tab.

Alternatively; right-click on the dependency or predecessor in the Dependency or Predecessor section of the Activity Detail view and select Edit (or use the short-cut F2).

2. Select the required Lag using the up and down arrows.

3. Click OK.

More Information:

Where an activity can be started before its predecessor completes, apply a negative lag. Where an activity has to start some time after its predecessor completes, apply a positive lag.

6.10 Remove an output and all associated successors from an activity

Why?

Where an activity's output is not relevant to your project, ensure that it is removed from the project model.

How?

1. Select the output and select Remove from the Outputs group on the Edit Activities tab.

Alternatively; right-click on the output in the Output section of the Activity Detail view and select Remove.

Alternatively; select the output in the Output section of the Activity Detail view and use the short-cut SHIFT+DELETE.

Alternatively; select the information in the View Information tab and choose Remove.

Alternatively; right-click on the information in the View Information tab and choose Remove (or use the short-cut SHIFT+DELETE).

More Information

See related help topic:

6.10 Remove a successor activity, whilst leaving the associated output in place.

6.11 Remove a successor activity, whilst leaving the associated output in place

Why?

Where an activity's successor is not relevant to your project, ensure that it is removed from the project model.

How?

1. Right-click on the successor in the Successors section of the Activity Detail view and select Remove.

Alternatively; select the successor in the Successors section of the Activity Detail view and use the short-cut SHIFT+DELETE.

More Information

See related help topic:

6.9 Remove an output and all associated successors from an activity.

6.12 Remove a dependency and the related predecessor from an activity

Why?

Where an activity's predecessor is not relevant to your project, ensure that it is removed from the project model.

How?

1. Select the dependency and select Remove from the Dependencies groups on the Edit Activities tab.

Alternatively; right-click on the dependency or predecessor in the Dependencies or Predecessors section of the Activity Detail view and select Remove.

Alternatively; select the dependency or predecessor in the Dependencies or Predecessors section of the Activity Detail view and use the short-cut SHIFT+DELETE.

6.13 Associate an existing project document with an activity output

Why?

Documents can be allocated to the outputs of activities. This allows the completeness of activities to be assessed based on the availability of tangible outputs.

How?

1. Select the View Documents tab.

2. Select the relevant document from the list shown (or select multiple documents by holding the SHIFT or CTRL keys as the selection is made).

3. Select Add to Information.

4. Browse through the project Work Breakdown Structure to the activity which produces the output with which the document is to be associated.

5. Select the existing output from the right-hand side of the table, or select the Add Information button to add a new output.

6. Select OK.

More Information:

Where there is no relevant activity onto which an output and document can be associated at step 4 above, select Generate Activity. This will create a new activity at level 1 of the project WBS.

6.14 Add a new project document and assign it to an activity output

Why?

Documents can be allocated to the outputs of activities. This allows the completeness of activities to be assessed based on the availability of tangible outputs.

How?

1. Select the output and select Edit from the Outputs group of the Edit Activities tab.

Alternatively; right-click on the output in the Output section of the Activity Detail view and select Edit (or use the short-cut F2).

Alternatively; select the information in the View Information tab.

2. In the Documents section select Add.

Alternatively; right-click on the Document section of the Information Editor and select Add (or use the short-cut INSERT).

3. Select the […] button and define the name, number and type of the document.

4. Click OK.

More Information

See related help topics:

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3.10 Add project documents to the model.

3.11 Import project documents to the model.

6.15 Remove a project document from an activity output

Why?

Ensure that only relevant documents are associated with each output.

How?

1. Select the output and select Edit from the Outputs group of the Edit Activities tab.

Alternatively; right-click on the output in the Output section of the Activity Detail view and select Edit (or use the short-cut F2).

Alternatively; select the information in the View Information tab and choose Edit.

Alternatively; select the information in the View Information tab.

2. Select the relevant Document and choose Remove.

Alternatively; right-click on the relevant Document and choose Remove.

Alternatively; right-click on the Document and use the short-cut SHIFT+DELETE.

CHAPTER 7: WORKING WITH A PROJECT MATRIX

7.1 View the project matrix

Why?

Identify the project process in matrix form and have the ability to calculate the optimal process sequence.

How?

1. Select the View Sequence tab.

7.2 Pan around the project matrix

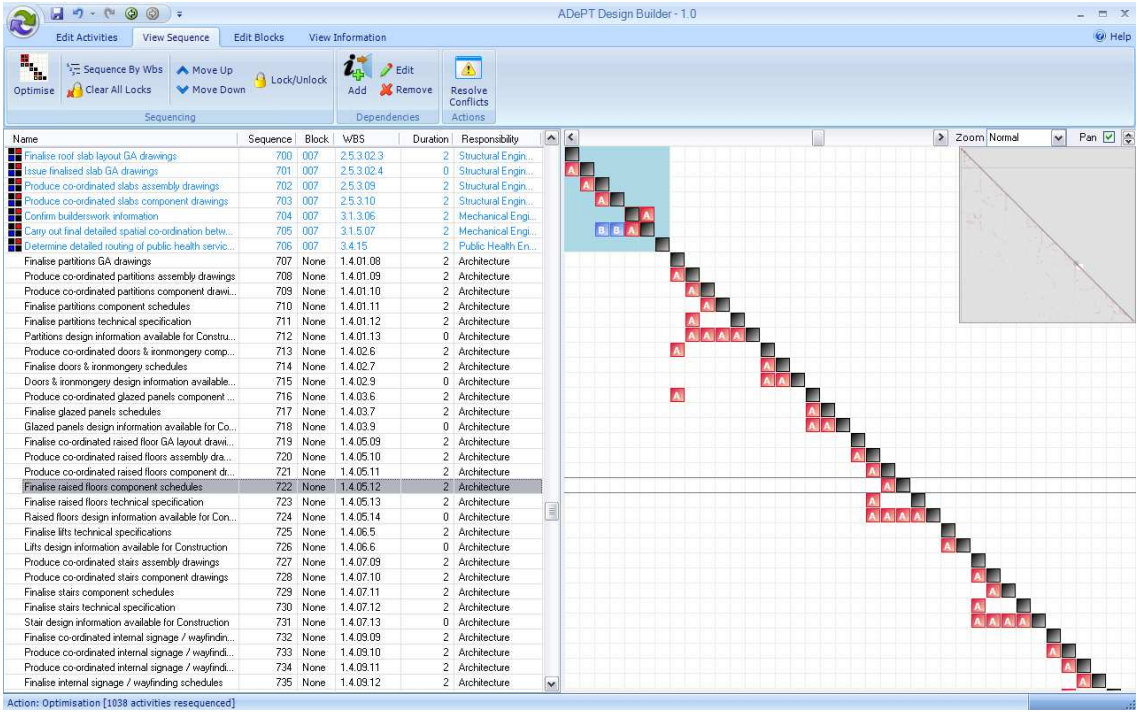
Why?

Quickly view a specific area of the project matrix in detail.

How?

1. Ensure that the Pan thumbnail is turned on by selecting the tick box in the top-right hand corner of the window.

2. Click on the white screen indicator in the thumbnail marker and, whilst holding down the left mouse button, drag the marker to the required part of the matrix.



7.3 Zoom in or out of the matrix view

Why?

Change the scale of the matrix on display so that the extent of the project process shown reflects your requirements.

How?

1. Select the required Zoom level from the drop-down list in the top-right hand corner of the window.

7.4 View dependencies, information and predecessor on the matrix

Why?

Check the characteristics of any two related activities without the need to read across rows / columns of to open the activity detail.

How?

1. Click on the required cell in the matrix.

More Information

Note that the relationship between any two activities can be seen by clicking on the intersecting cell, not just relationships which have existing dependencies.

7.5 Add dependencies between activities directly on the matrix view

Why?

Quickly add dependencies between activities at the intersection between them, rather than going through the Activity Detail view.

How?

1. Select Add from the Dependency group on the View Sequence tab.

Alternatively; right-click on the required cell on the matrix and select Add Dependency.

2. Enter the dependency Name, Classification (if not already entered), and dependency Type.

3. Click OK.

7.6 Edit dependencies between activities directly on the matrix view

Why?

Quickly edit dependencies between activities at the intersection between them, rather than going through the Activity Detail view.

How?

1. Select Edit from the Dependency group on the View Sequence tab.

Alternatively; right-click on the required cell on the matrix and select Edit Dependency.

2. If changing a dependency, enter the new dependency Name, Classification (if not already entered), and dependency Type.

3. Click OK.

7.7 Remove dependencies between activities directly on the matrix view

Why?

Quickly remove dependencies between activities at the intersection between them, rather than going through the Activity Detail view.

How?

1. Select Remove from the Dependency group on the View Sequence tab.

Alternatively; right-click on the required cell on the matrix and select Remove Dependency.

7.8 Observe whether predecessors and successors are 'Driving' and/or 'Critical'

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Why?

Observe which of an activity's predecessors is 'driving' it to start as late as it does and whether the activity 'drives' and of its successors to be as late as they occur (or whether they are driven by other activities). Similarly, observe whether any of an activities predecessors or successors are on the project's Critical Path.

How?

1. Select Reschedule on the View Sequence tab.
2. Select the Edit Activities tab.
3. Observe 'driving' predecessors, and 'driven' successors, in the Activity Detail view in **bold** type face.
3. Observe predecessors and successors which are on the project's Critical Path in the Activity Detail view in red type face.

More Information:

Predecessors and successors can be shown in **bold and red**, meaning that they are both driving links and on the Critical Path.

CHAPTER 8: ANCHORING ACTIVITIES IN A MATRIX

8.1 Lock / unlock activities in position in the process sequence (anchoring)

Why?

Where activities are to be placed in known positions in the process sequence, lock them before moving them into that position so that they are retained in the required position when the process sequence is optimised.

How?

1. Select Lock / Unlock on the View Sequence tab.

Alternatively; right-click on the activity and select Lock / Unlock.

Alternatively; use the short-cut key CTRL+L.

8.2 Move an activity in the optimised process sequence

Why?

Position activities which are required in known positions in the process sequence in the position required, for example where time constraints have been applied but are not met in the initial optimised matrix sequence.

How?

1. Select the activity required from the list adjacent to the matrix in the View Sequence tab.

2. Lock the activity by selecting Lock / Unlock on the View Sequence tab.

Alternatively; right-click on the activity and select Lock / Unlock.

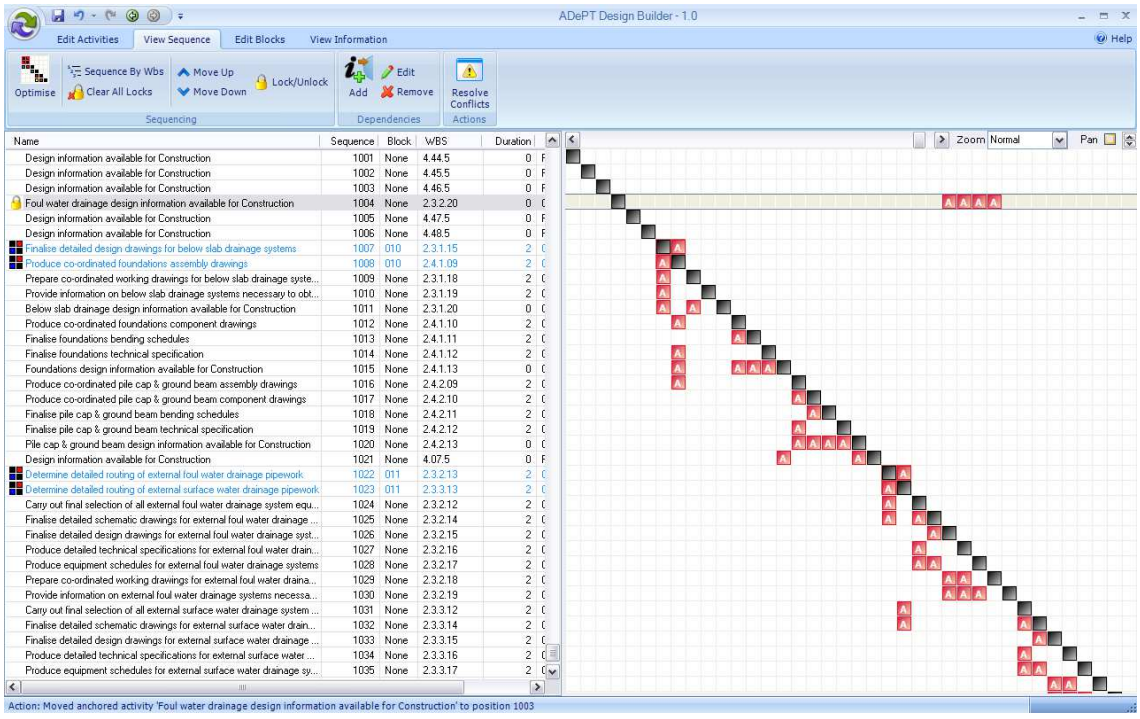
Alternatively; use the short-cut key CTRL+L.

3. Select Move Up or Move Down on the View Sequence tab.

Alternatively; right-click on the activity and select Move Up or Move Down.

Alternatively; use the short-cut keys CTRL+U or CTRL+D.

Alternatively; right-click on the activity and select Move to Position …



More Information

See related help topic:

8.1 Lock / unlock activities in position in the process sequence (anchoring).

Observe whether an activity's dates comply with an assigned time constraint.

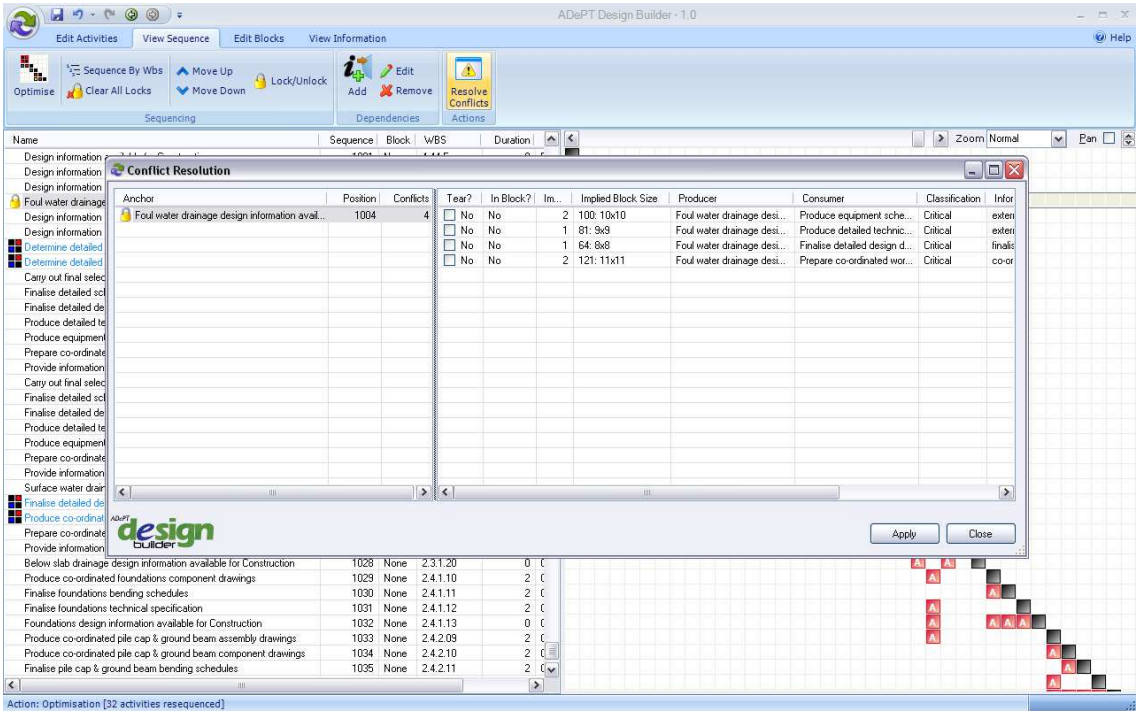
8.3 View locked activities and any resulting implied iterative blocks of activities

Why?

Where activities have been anchored in known positions in the process sequence, they can result in dependencies placed above the diagonal in the matrix. Clearly it is not desirable to have this result in iterative blocks of activities but can be useful to observe the size of any 'implied' blocks and any tears which are required to avoid the blocks.

How?

1. Ensure that the process sequence is optimised by selecting Reschedule on the View Sequence tab.
2. Select Resolve Conflicts on the View Sequence tab.
3. Choose the locked or anchored activity from the drop-down list.
4. Note the size of any implied block, which will be the distance of a dependency which is placed furthest above the matrix diagonal.



8.4 Tear locked activities / dependencies to avoid new iterative blocks of activities

Why?

Where activities have been anchored in known positions in the process sequence, they can result in dependencies placed above the diagonal in the matrix. Clearly it is not desirable to have this result in iterative blocks of activities so tearing is required to avoid the blocks.

How?

1. Select Resolve Conflicts on the View Sequence tab.

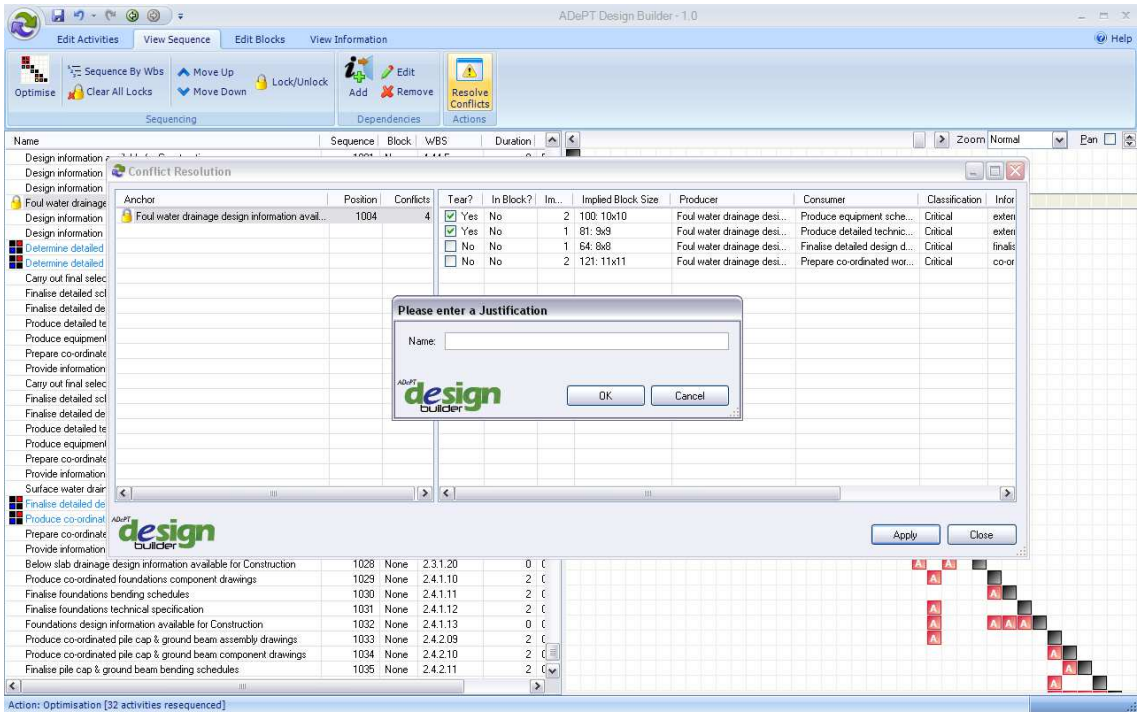
2. Choose the locked or anchored activity from the drop-down list.

3. Note the Impact of deciding not to tear each dependency which is above the diagonal as a result of the anchored activity.

4. Select or deselect Tear in the tick box adjacent to each dependency.

5. Select Apply.

6. Record the Justification for any tears.



More Information

Note that where tears are deselected this can result in other activities being anchored adjacent to the activity - which is necessary to remove dependencies from above the matrix diagonal. Therefore, further activities will appear in the drop-down list of anchored activities and further tearing may be required.

CHAPTER 9: OPTIMISING AND TEARING A MATRIX

9.1 Optimise the activity sequence in the matrix

Why?

Establish the optimal sequence in which to undertake the activities in your process.

How?

1. Select Reschedule on the View Sequence tab.
2. Select All Activities (to reschedule the entire project) or Only New Activities (to assign start and finish dates to activities added since the project was last rescheduled, but to leave other dates unchanged).
3. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.

More Information

When calculating activity start and finish dates, the ADePT Design software assumes that an activity with completed predecessors can commence starting on the Project Report Date (status date or data date). This same effect is achieved by default when scheduling within Asta Powerproject, in Primavera by selecting Progress Override from within the scheduling options, and in Microsoft Project by selecting 'Move End of Completed Parts After Status Date Back to Status Date' and 'Move Start of Remaining Parts Back to Status Date' in the Calculation tab on the Options dialogue box on the Tools menu.

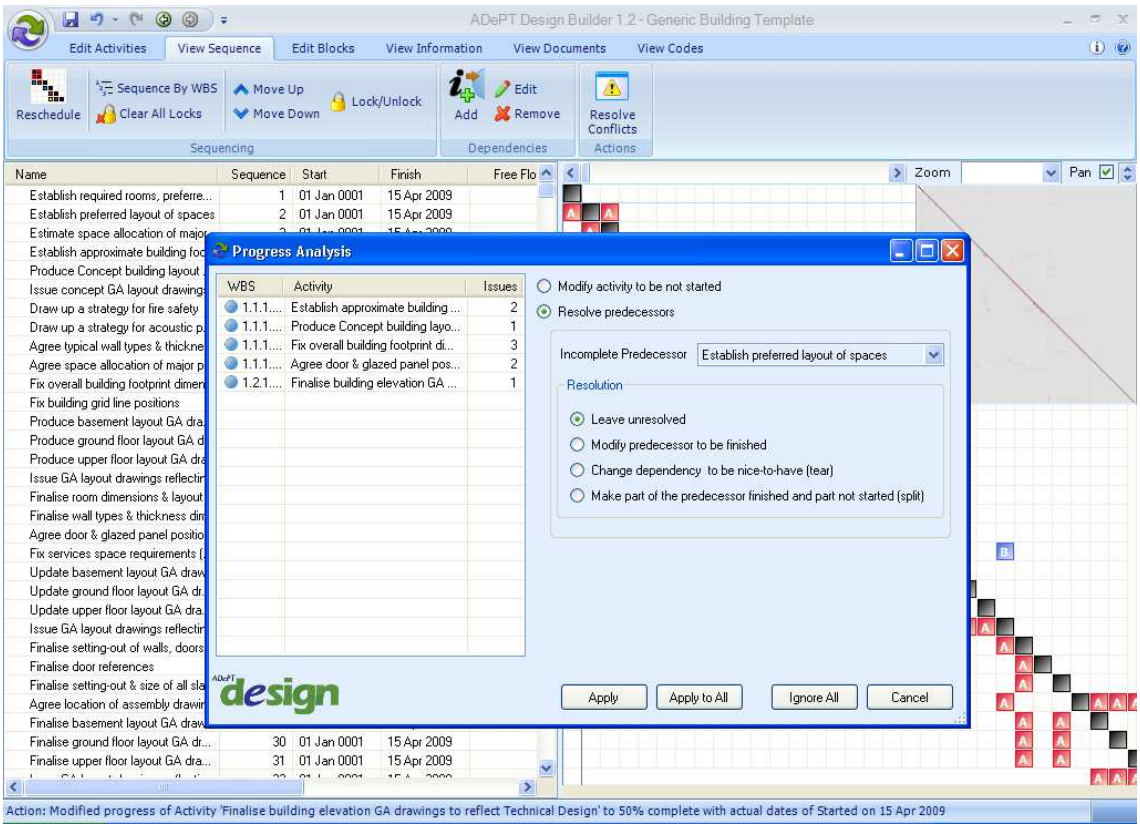
9.2 Identify and resolve 'out-of-sequence progress'

Why?

In certain instances during a project the activities may not follow the predetermined logic which was established during the planning phase. Certain successors may actually be able to start before the full completion of their predecessors. This is termed 'out-of-sequence progress'. In order for ADePT Design Builder to accurately reflect this scenario in the plan certain criteria must be specified.

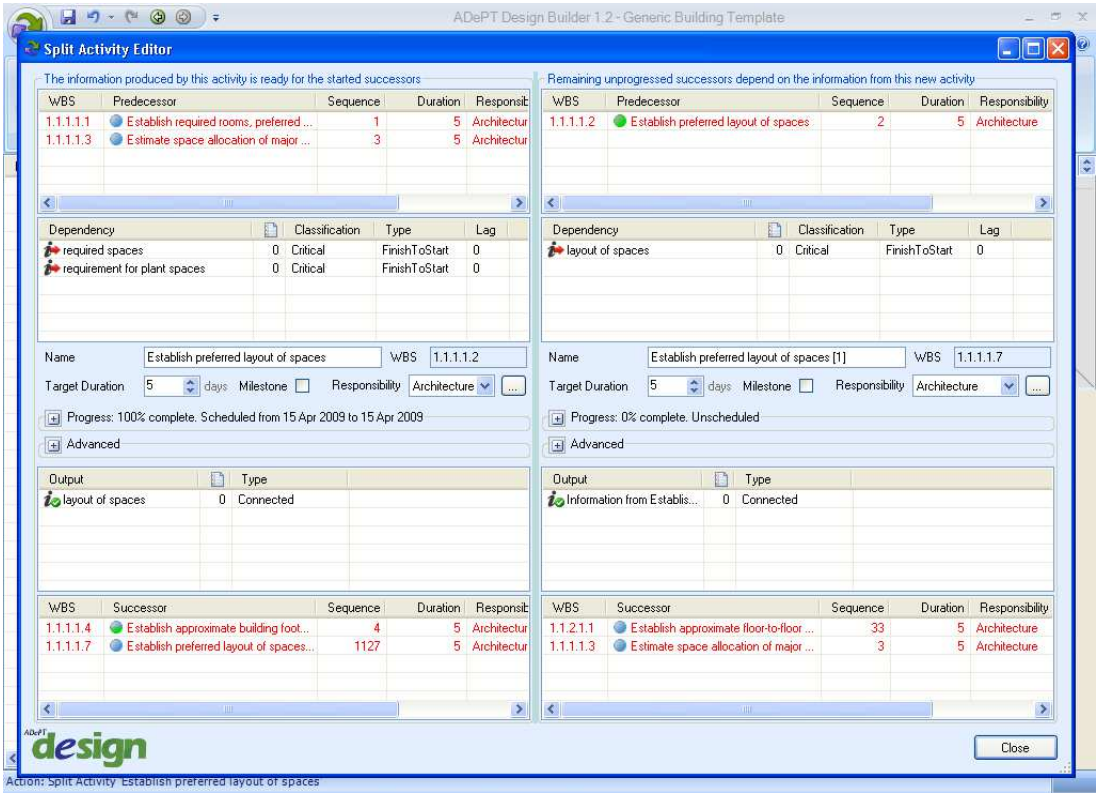
How?

1. Select Reschedule on the View Sequence tab.
2. If an out-of-sequence scenario exists you will be presented with the 'Progress Analysis' prompt screen as below:



3. Depending on the scenario one of several options can be specified:
    - The first option is to 'Modify activity to be not started'. This option should be selected if the selected activity has been misreported or accidentally identified as being progressed. The activity is then amended to have 0% progress.
    - If the reporting of progress is correct then the out-of-sequence progress associated with the incomplete predecessor needs to be resolved. From the drop down menu select the chosen Incomplete Predecessor. Then select one of the resolutions from the list. These are described below:
        - Leave unresolved – This option assumes that progress on a successor can in fact continue despite the predecessor not being complete. However the assumption is that the logic is retained and that there is still an inherent link between the two activities. In other words, an early start to the successor is allowed but the predecessor must be complete before the successor can be fully complete.
        - Modify predecessor to be finished – This option assumes that progress on a predecessor has not been updated and it is finished thus allowing the successor to proceed.
        - Change dependency to be 'nice to have' (tear) – This selection 'tears' the critical logic link between the two activities and enables the successor to continue without full completion of the predecessor. This option would be relevant, for example, where an assumption has been made about the output from the predecessor.
        - Make part of the predecessor finished and part not started (split) – This option assumes that the predecessor can be broken down into two separate activities, one of which is required before the successor can start, the other being the full completion of the original predecessor.
    - In the last of the above options clicking 'Apply' will bring up the Split Activity Editor dialogue box where detail about the two activities which are to be formed from splitting the single one can be specified. It is recommended that the subsequent 'unprogressed' part of the task is renamed at this stage. Other links which the single

activity had prior to splitting will be retained on one of the two new activities (with progressed successors dependent on the first, completed, new activity and unprogressed successors dependent on the second new activity) thus retaining the logic within the programme. When a split activity has been specified, select Close.



4. Select Apply to apply the resolution to the chosen activity or predecessor, or Apply to All to apply the chosen resolution to all activities or predecessors. Alternatively, Ignore All can be selected to ignore the remaining resolutions, thus leaving them unresolved.

5. Repeat the above process for the other out-of-sequence activities identified in the progress analysis window.

9.3 Place activities in the matrix in the order they appear in the WBS

Why?

View the process in the order as dictated by the WBS - the 'unoptimised' sequence.

How?

1. Select Sequence by WBS Sequence on the View Sequence tab.

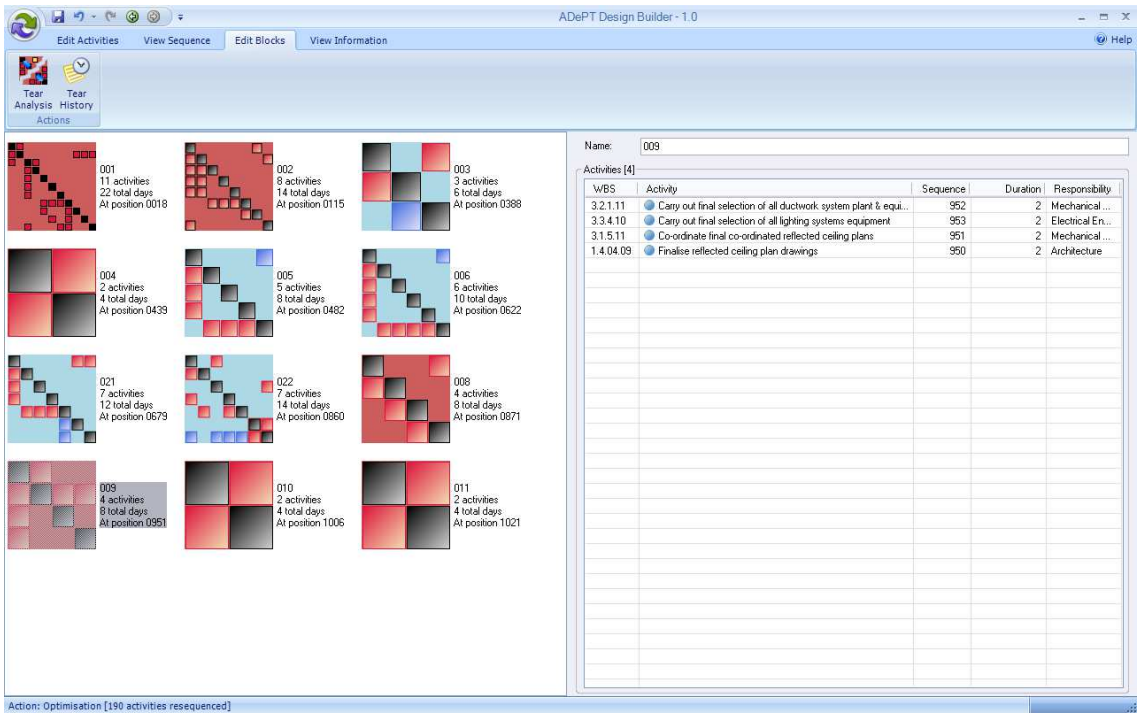
9.4 View details of all iterative blocks in the optimised process

Why?

Gain a quick overview of all iterative blocks in the process.

How?

1. Select the Edit Blocks tab.



9.5 Amend the combined duration of activities in an iterative block

Why?

Having identified the activities in an iterative block assign a duration to the block as a whole, independently of the durations of the individual activities in the block, so that an appropriate timescale for the block is allowed when a bar chart is generated.

How?

1. Select the relevant block shown in the Edit Blocks tab.
2. Enter the new block Duration on the right-hand pane.

More Information

It is recommended that the duration of iterative blocks is only set after all tearing and anchoring is completed, just prior to any export to a bar chart, since ongoing process analysis may mean that the blocks change.

When a bar chart is generated any predecessors of activities in the block will be shown starting after the first activity in the block has started plus whatever duration has been assigned to the block.

9.6 Tear the dependencies in an iterative block of activities

Why?

Reduce the scale of iteration by either reducing the size of an iterative block by splitting an iterative block into multiple smaller blocks.

How?

1. Select the relevant block shown in the Edit Blocks tab.
2. Select Tear Analysis from the Edit Blocks tab.
3. Select the dependency to tear (or multiple dependencies).

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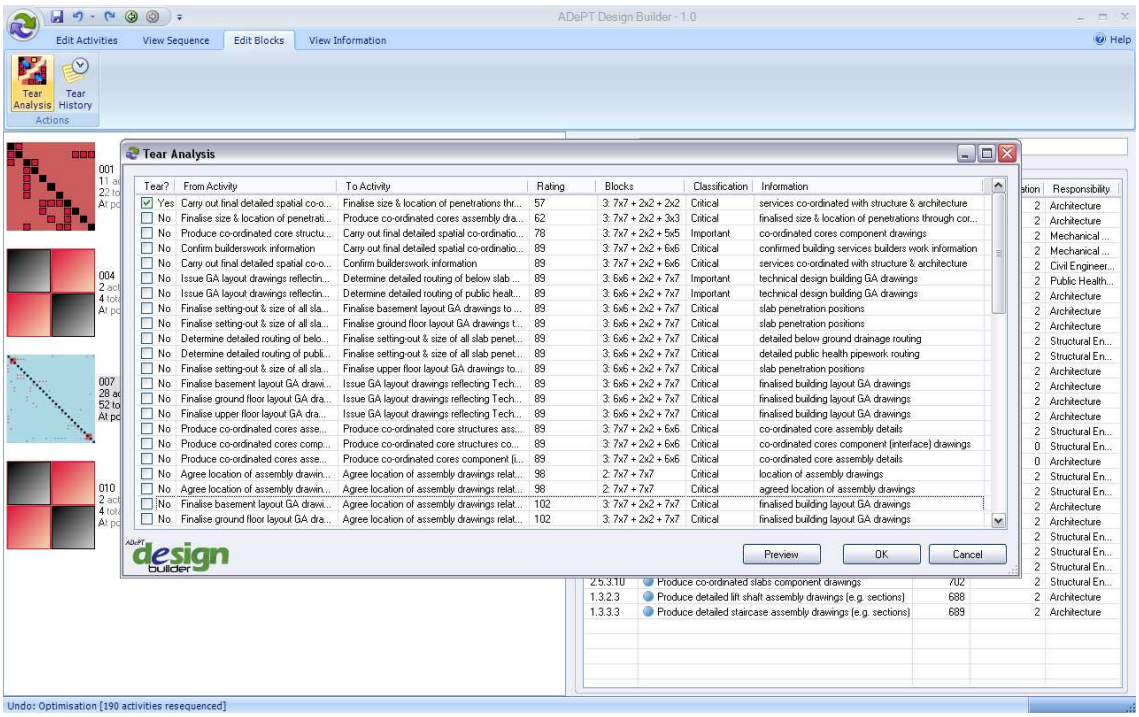
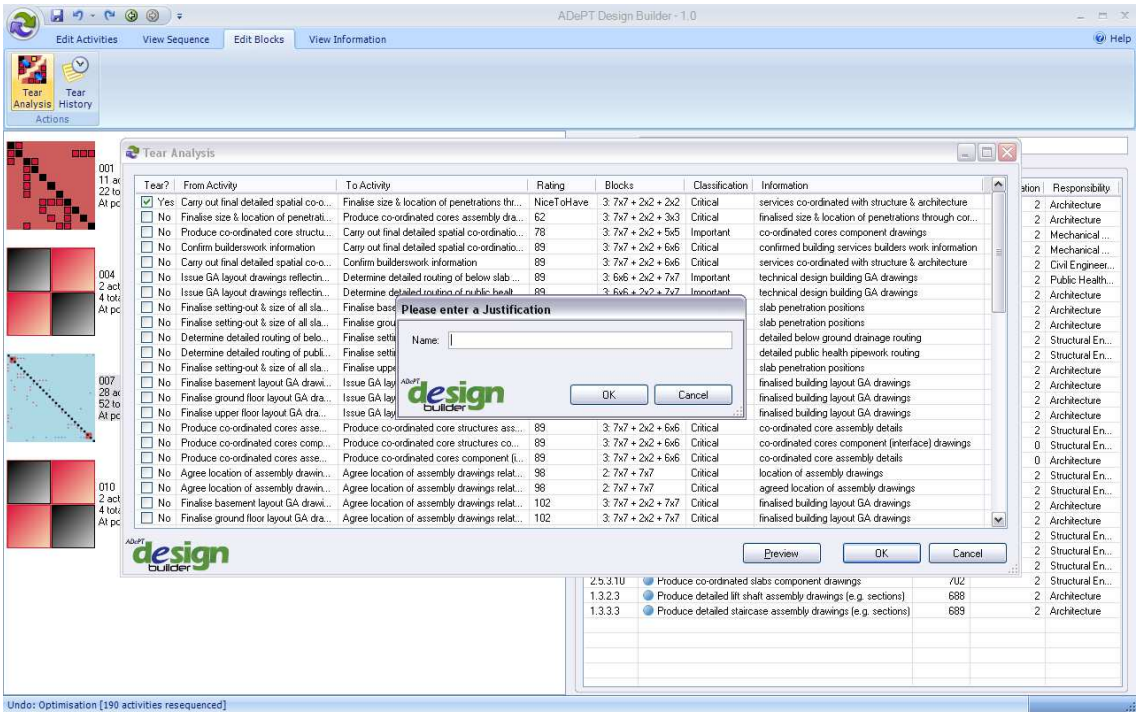


4. Select OK.

5. Enter the Justification for the tear or tears being made.



6. Select OK.

More Information

The tear rating shows the number of cells which will remain in iterative blocks after the dependency has been torn. The rating is calculated for each tear individually. To observe the effect of multiple tears undertaken simultaneously, select the dependencies and use tear Preview.

Adjacent to the tear rating is an alternative indication of the number and scale of iterative blocks which will remain following the tear. This shows where the iterative block being analysed can be split into multiple blocks (which is a desirable effect).

See related help topic:

9.7 Preview the effect of tearing dependencies in an iterative block of activities.

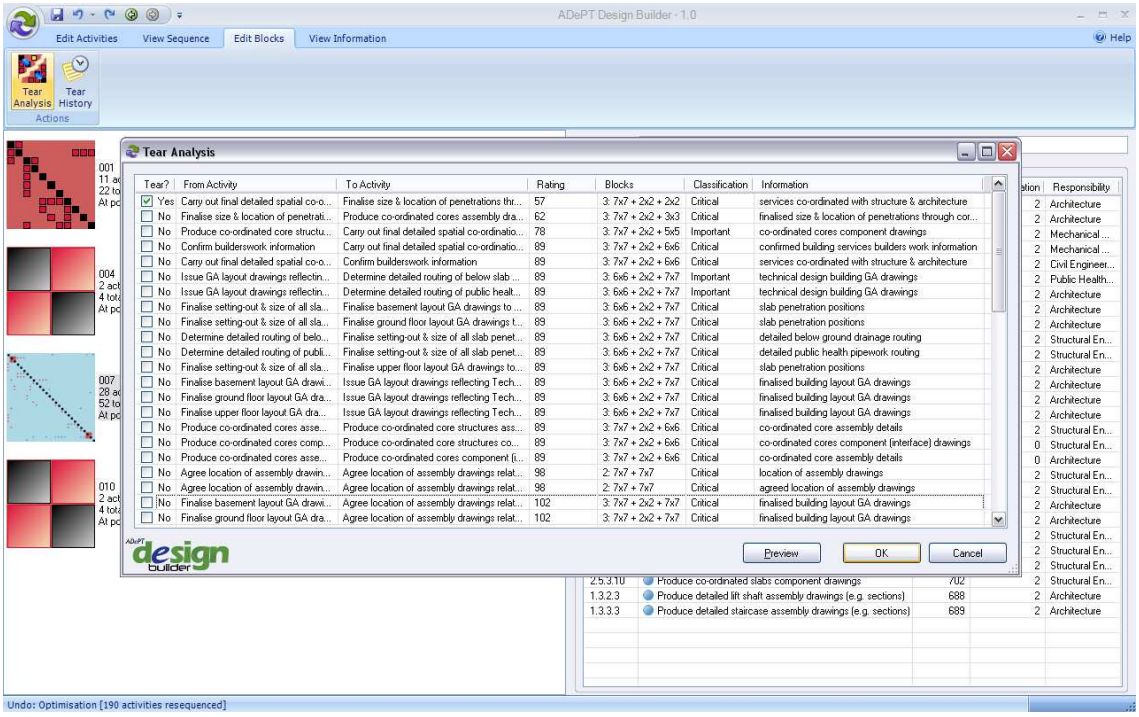
9.7 Preview the effect of tearing dependencies in an iterative block of activities

Why?

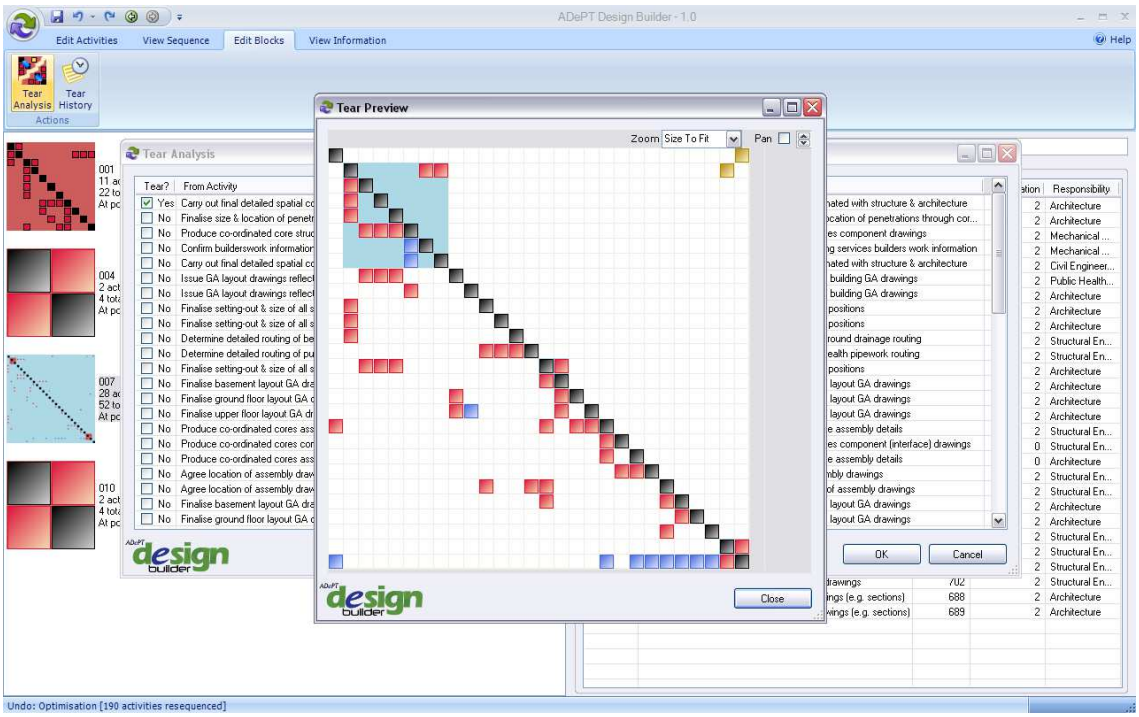
Understand the exact effect of a tear (or tears) within an iterative blockbefore imposing them.

How?

1. Select the relevant block shown in the Edit Blocks tab.
2. Select Tear Analysis from the Edit Blocks tab.
3. Select the dependency to tear (or multiple dependencies).



4. Select Preview.



5. Select Close.

More Information

See related help topic:

9.6 Tear the dependencies in an iterative block of activities.

9.8 View a record of all tears made (tear history)

Why?

View and/or export a record of all tear decisions as these form key decision points in your project process.

How?

1. Select Tear History on the Edit Blocks tab.

9.9 Copy a record of all tears made (tear history) to a third-party application

Why?

Export a record of all tear decisions as these form key decision points in your project process.

How?

1. Select Tear History on the Edit Blocks tab.
2. Select Copy History.
3. Open the application where tear history is to be copied and select Paste or use the short-cut key CTRL+V.

9.10 Observe start and end dates of activities

Why?

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Understand when each activity will start and finish, based on calendars, activity durations and dependencies.

How?

1. Select the View Sequence tab.
2. Select Reschedule on the View Sequence tab.
3. Observe start and finish dates in the table columns in the left-hand pane.

More Information:

In ADePT Design Builder, each activity is scheduled to start and finish as soon as possible, based on the dependencies between all activities. Changes to this setting, and therefore to dates, can be made in the bar chart when it has been generated.

Where changes are made in the model which effect start and end dates, such as activity durations, calendars, dependencies, and time constraints, new start and end dates will only be calculated when the sequence is next optimised.

9.11 Observe whether an activity has any float or is on the project's Critical Path

Why?

Understand whether any delay to the activity would result in other activities or the end date of the project being delayed.

How?

1. Select Reschedule on the View Sequence tab.
2. Observe Free Float and Total Float in the columns in the left-hand pane.

Alternatively; select the Progress [+] option in the Activity Detail view on the Edit Activities tab.

More Information:

Where an activity has a free float of 0, any delay in that activity will delay at least one successor. Where an activity has a total float of 0, any delay in that activity will delay the project end date (i.e. it is on the critical path).

9.12 Observe whether an activity's dates comply with an assigned time constraint

Why?

Understand whether the sequence of activities, based on calendars, activity durations and dependencies, allows time constraints to be met.

How?

1. Select the View Sequence tab.
2. Select Reschedule on the View Sequence tab.
3. Observe activities with a Time Constraint, marked by a clock symbol to the left-hand side of the activity name [ ]
4. Observe any activities with a Time Constraint which is not being met in the current sequence, marked with a clock and warning symbol to the left-hand side of the activity name [ ]

More Information:

See related help topics:

Assign a time constraint to an activity.

Move an activity in the optimised process sequence.

CHAPTER 10: CREATING OR UPDATING A BAR CHART

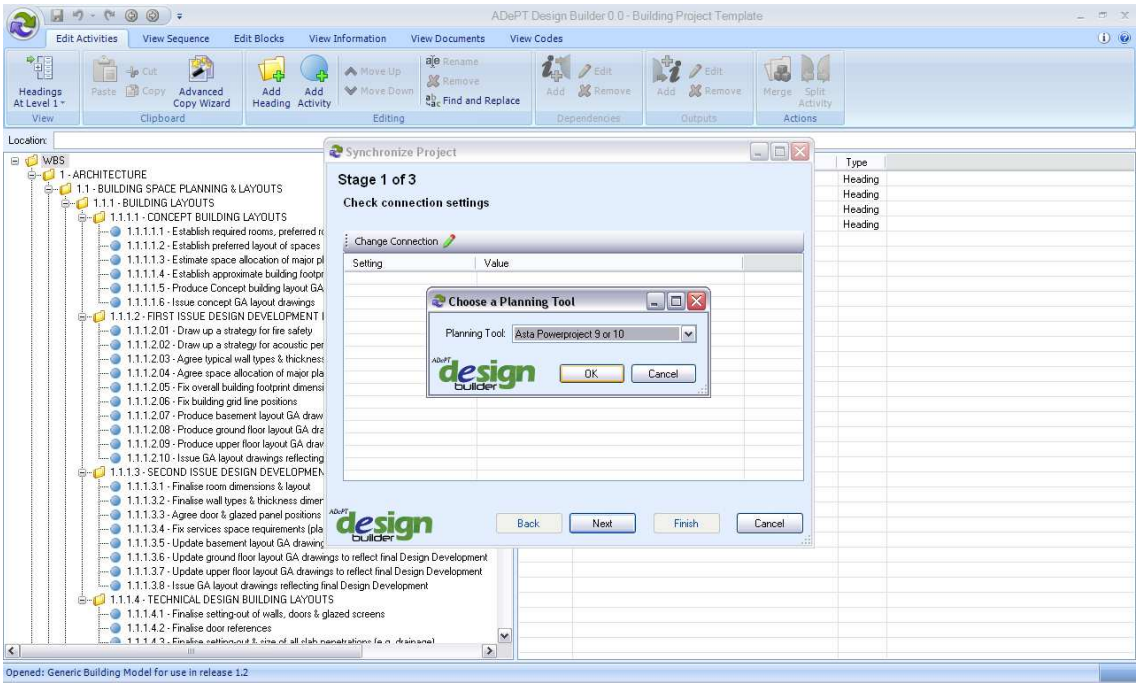
10.1 Generate a new Asta Power Project bar chart from a model file

Why?

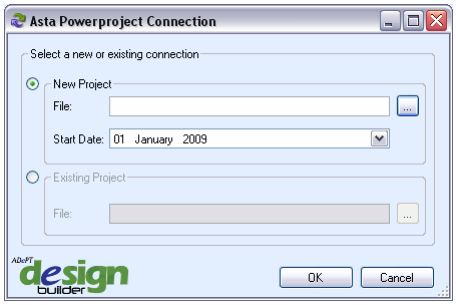
Represent your process model in bar chart form so that it can be viewed against a timescale and managed throughout the project.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.
2. At Stage 1 of the Synchronise Project Wizard, select Change Connection
3. Choose the relevant third-party application from the drop-down list and select OK

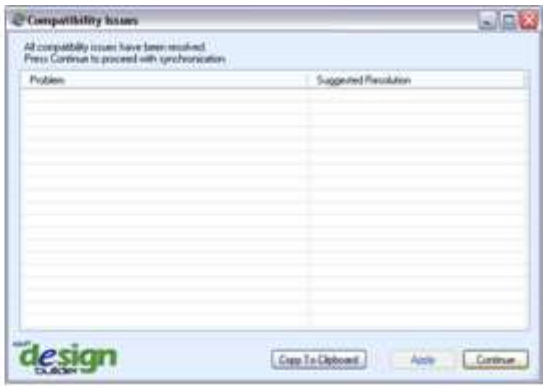


4. Select New Project and select […] to create and locate the relevant file.

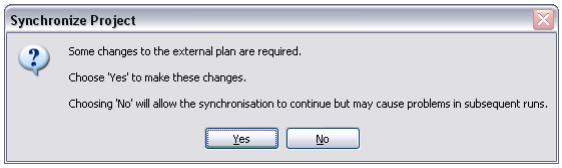


5. Select OK
6. Select Next to move to stage 2 of the Synchronise Project Wizard.

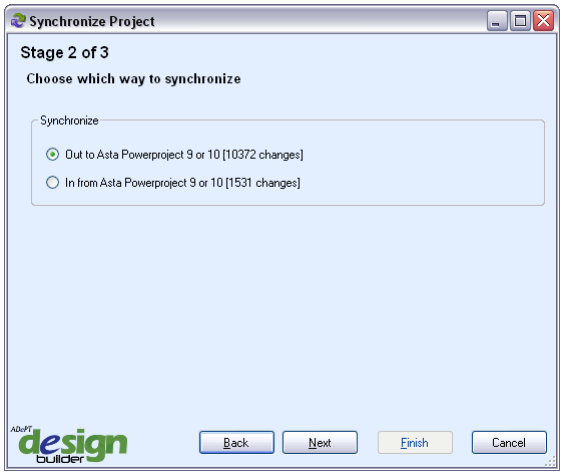
Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.



Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

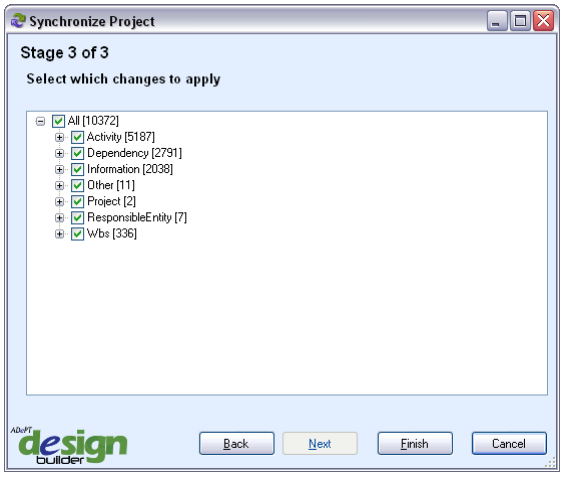


7. At stage 2 of the Synchronise Project Wizard, select Out to Asta Powerproject.



8. Select Next

9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.



10. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with versions 9 and 10 of Asta Power Project.

Imposing a large number of changes on an external file can take a few minutes. In particular, creating a new bar chart may involve a large number of changes and take some time to generate the third-party file.

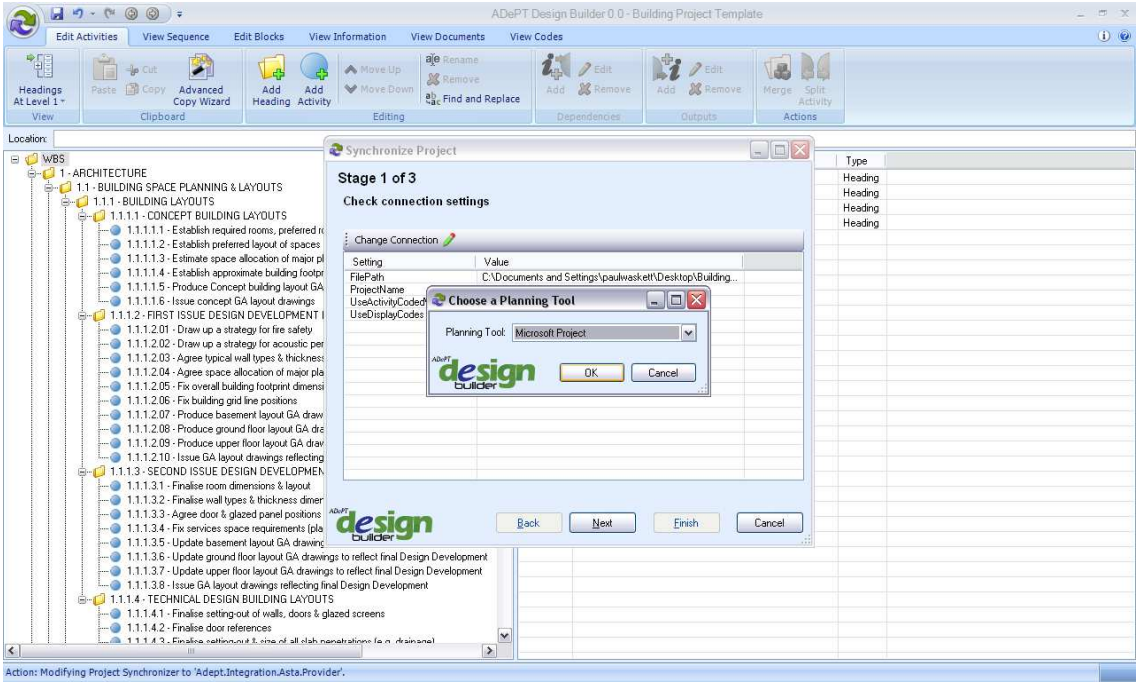
10.2 Generate a new Microsoft Project bar chart from a model file

Why?

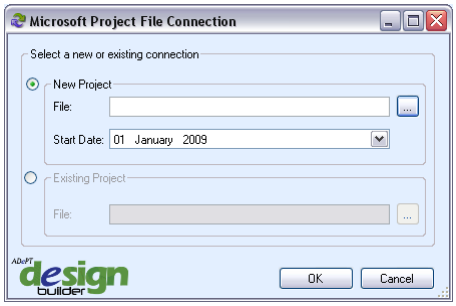
Represent your process model in bar chart form so that it can be viewed against a timescale and managed throughout the project.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.
2. At Stage 1 of the Synchronise Project Wizard, select Change Connection
3. Choose the relevant third-party application from the drop-down list and select OK



4. Select New Project and select […] to create and locate the relevant file.

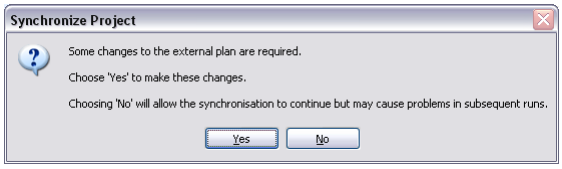


5. Select OK

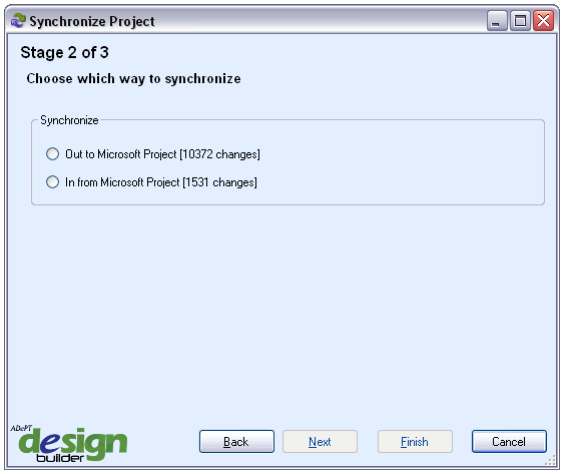
6. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

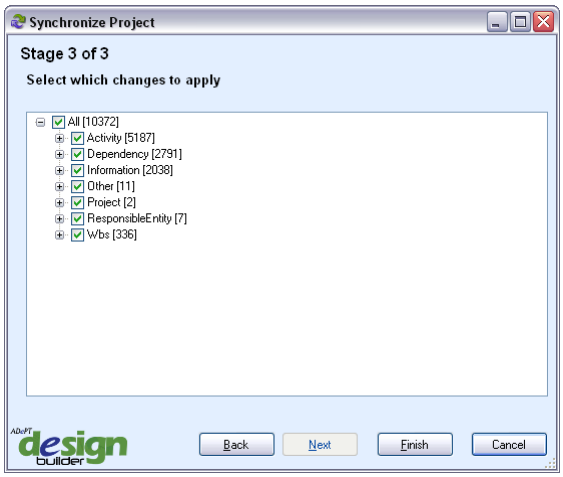


7. At stage 2 of the Synchronise Project Wizard, select Out to Microsoft Project.



8. Select Next

9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.



10. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with Microsoft Project 2003 and 2007 versions.

Imposing a large number of changes on an external file can take a few minutes. In particular, creating a new bar chart may involve a large number of changes and take some time to generate the third-party file.

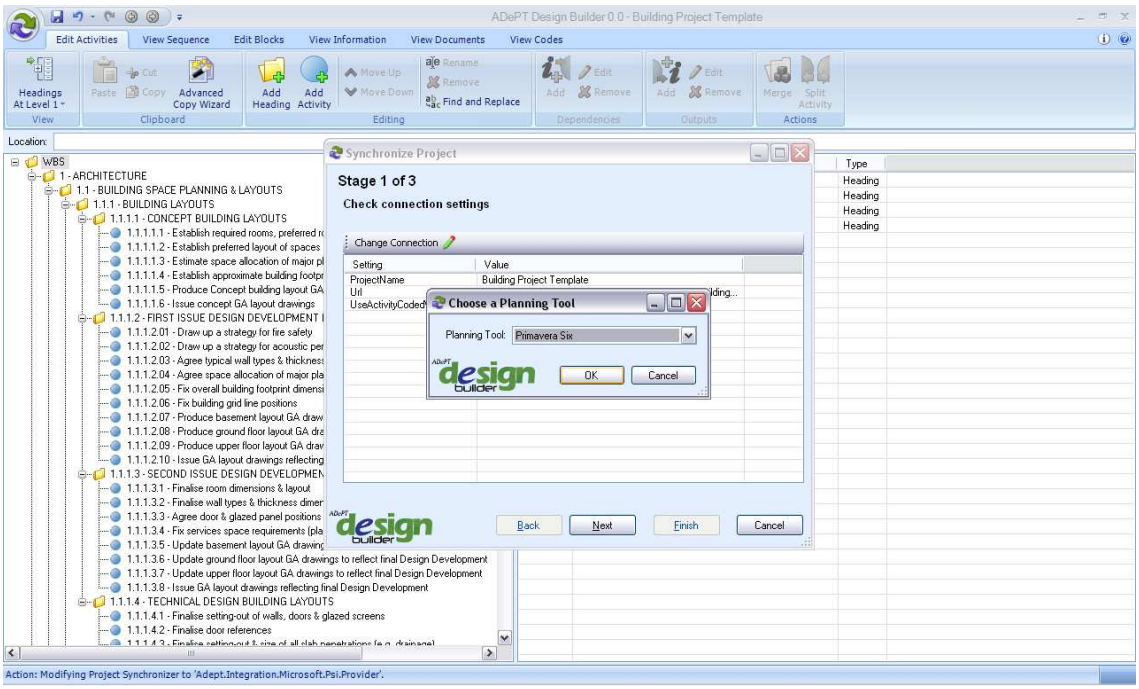
10.3 Generate a new Primavera bar chart from a model file

Why?

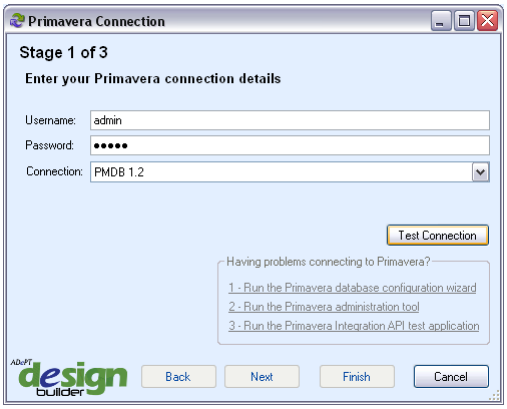
Represent your process model in bar chart form so that it can be viewed against a timescale and managed throughout the project.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.
2. At Stage 1 of the Synchronise Project Wizard, select Change Connection
3. Choose the relevant third-party application from the drop-down list and select OK

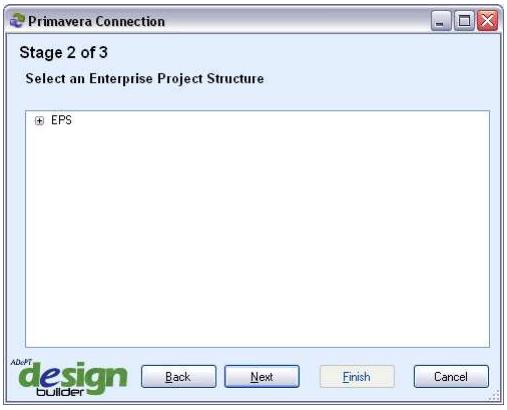


4. At stage 1 of the Primavera Connection Wizard, enter the Primavera username, password and database connection and select Test Connection.



5. Select Next.

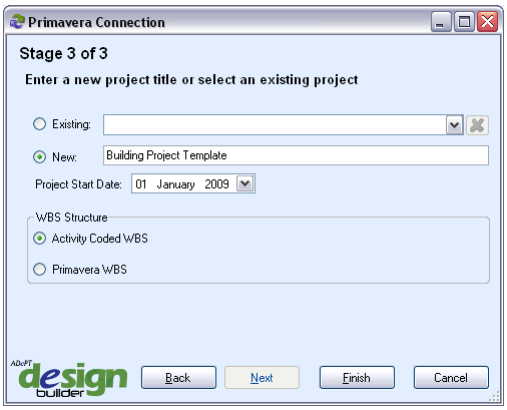
6. At stage 2 of the Primavera Connection Wizard, select the location in the Primavera EPS of the project.



7. Select Next.

8. At stage 3 of the Primavera Connection Wizard select New and enter the project name and choose the means of representing the Work Breakdown Structure in Primavera by

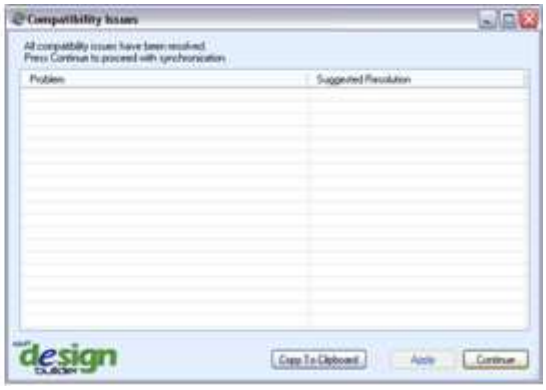
selecting Default or Activity Coded WBS – Activity Coded WBS is recommended as the bar chart can be represented in accordance with the WBS defined in ADePT Design Builder.



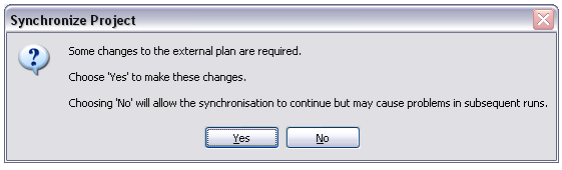
9. Select Finish.

10. Select Next to move to stage 2 of the Synchronise Project Wizard.

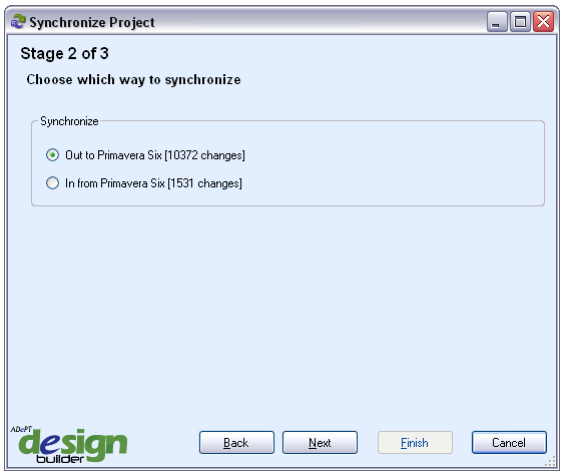
Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.



Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

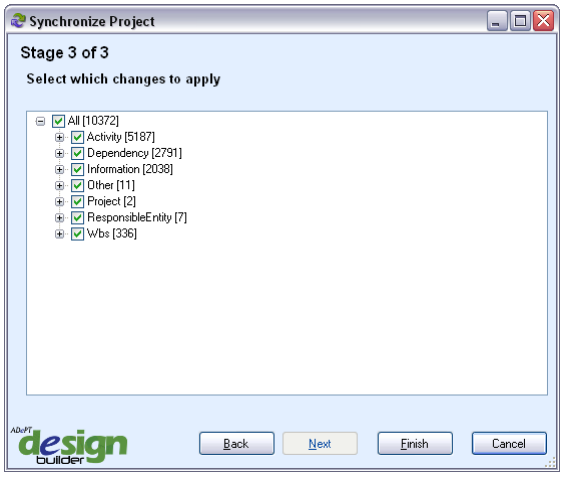


11. At stage 2 of the Synchronise Project Wizard, select Out to Primavera Six.



12. Select Next

13. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.



14. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with Primavera version 6.

Imposing a large number of changes on an external file can take a few minutes. In particular, creating a new bar chart may involve a large number of changes and take some time to generate the third-party file.

10.4 Update an existing Asta Power Project bar chart from a model file

Why?

Update an existing bar chart with any new changes in the model file.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.

2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.

3. Choose the relevant third-party application from the drop-down list and select OK

4. Select Existing Project and select […] to locate the relevant file.

5. Select OK

6. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

7. At stage 2 of the Synchronise Project Wizard, select Out to Asta Powerproject.

8. Select Next

9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.

10. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with versions 9 and 10 of Asta Power Project.

Imposing a large number of changes on an external file can take a few minutes.

10.5 Update an existing Microsoft Project bar chart from a model file

Why?

Update an existing bar chart with any new changes in the model file.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.

2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.

3. Choose the relevant third-party application from the drop-down list and select OK

4. Select Existing Project and select […] to locate the relevant file.

5. Select OK

6. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

7. At stage 2 of the Synchronise Project Wizard, select Out to Microsoft Project.

8. Select Next

9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.

10. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with Microsoft Project 2003 and 2007 versions.

Imposing a large number of changes on an external file can take a few minutes.

10.6 Update an existing Primavera bar chart from a model file

Why?

Update an existing bar chart with any new changes in the model file.

How?

1. Select Synchronise from the File menu. If progress has been captured 'out-of-sequence' then this will be reported on a Progress Analysis dialogue box. See 9.2 for a description of resolving out-of-sequence progress.

2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.

3. Choose the relevant third-party application from the drop-down list and select OK

4. At stage 1 of the Primavera Connection Wizard, enter the Primavera username, password and database connection and select Test Connection.

5. Select Next.

6. At stage 2 of the Primavera Connection Wizard, select the location in the Primavera EPS of the project.

7. Select Next.

8. At stage 3 of the Primavera Connection Wizard select Existing and select the project from the drop-down list.

9. Select Finish.

10. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

11. At stage 2 of the Synchronise Project Wizard, select Out to Primavera Six.

12. Select Next

13. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the third-party file using the tick boxes – usually leave all changes highlighted.

14. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with Primavera version 6.

Imposing a large number of changes on an external file can take a few minutes. In particular, creating a new bar chart may involve a large number of changes and take some time to generate the third-party file.

10.7 Update a model file from an Asta Power Project bar chart

Why?

Update an existing model file with any new changes in made in a third-party bar chart.

How?

1. Select Synchronise from the File menu.
2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.
3. Choose the relevant third-party application from the drop-down list and select OK
4. Select Existing Project and select […] to locate the relevant file.
5. Select OK
6. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

7. At stage 2 of the Synchronise Project Wizard, select In from Asta Powerproject.
8. Select Next
9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the ADePT model file using the tick boxes – usually leave all changes highlighted.
10. Select Finish.

10.8 Update a model file from a Microsoft Project bar chart

Why?

Update an existing model file with any new changes in made in a third-party bar chart.

How?

1. Select Synchronise from the File menu.
2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.
3. Choose the relevant third-party application from the drop-down list and select OK
4. Select Existing Project and select […] to locate the relevant file.

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5. Select OK

6. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

7. At stage 2 of the Synchronise Project Wizard, select In from Microsoft Project.

8. Select Next

9. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the ADePT model file using the tick boxes – usually leave all changes highlighted.

10. Select Finish.

10.9 Update a model file from a Primavera bar chart

Why?

Update an existing model file with any new changes in made in a third-party bar chart.

How?

1. Select Synchronise from the File menu

2. At Stage 1 of the Synchronise Project Wizard, if a synchronisation was undertaken when the bar chart file was first created then the same third-party file will be the target of this synchronisation. If a different file is the subject of this synchronisation select the Change Connection [ ] symbol.

3. Choose the relevant third-party application from the drop-down list and select OK

4. At stage 1 of the Primavera Connection Wizard, enter the Primavera username, password and database connection and select Test Connection.

5. Select Next.

6. At stage 2 of the Primavera Connection Wizard, select the location in the Primavera EPS of the project.

7. Select Next.

8. At stage 3 of the Primavera Connection Wizard select Existing and select the project from the drop-down list.

9. Select Finish.

10. Select Next to move to stage 2 of the Synchronise Project Wizard.

Note that two checks will be undertaken at this point: firstly the ADePT file will be checked for any incompatibility issues such as overly long activity names or illegal characters which cannot be handled by the third-party planning tool. In the event that compatibility issues are presented in a list, select Apply and then Close to make the suggested changes to your ADePT file.

Secondly, the third-party file will be checked for any incompatibility issues. There cannot be any such issues when the third-party plan is initially created but from thereon issues such as missing ID numbers will result in a prompt stating that 'Some Changed to the External Plan are Required'. It is recommended that Yes is selected in order to make the changes.

11. At stage 2 of the Synchronise Project Wizard, select In from Primavera Six.

12. Select Next

13. At stage 3 of the Synchronise Project Wizard, highlight the changes to make to the ADePT model file using the tick boxes – usually leave all changes highlighted.

14. Select Finish.

More Information

ADePT Design Builder version 1.2 can be synchronised with Primavera version 6.

Imposing a large number of changes on an external file can take a few minutes. In particular, creating a new bar chart may involve a large number of changes and take some time to generate the third-party file.